

Privacy Notice

In the course of carrying out its business, Underwoods LLP collects, stores and uses information relating to individuals. We are committed to safeguarding and preserving the privacy of this data, and the use of your personal data will be governed by this Privacy Notice.

Underwoods LLP is a registered member of the Information Commissioner's Office (ICO).

1.0 Introduction

Underwoods LLP is a data controller for the personal information that it collects and uses about you. We will treat your personal data as confidential and in accordance with the applicable data protections legislation, and your personal data will only be shared with others in accordance with this Privacy Notice.

2.0 What is Personal Data?

Personal data includes any information relating to an identified or identifiable person. This can include a name, date of birth, bank account details, an identification number, or similar.

3.0 What Personal Information do we collect?

Whenever you engage with us a member of staff will collect your personal details to include your full name and contact details (such as phone number, email address and postal address).

If we are providing a service to you, where we are required to do so by law (i.e. Anti-Money Laundering regulations), information relating to the your identity will also be collected which will be at least one form of photographic and one form of documentation with proof of your place of residence.

In addition, we will also confirm whether you have any relatives or close connections working within the firm so that potential conflicts of interests can be identified and managed, in accordance with statutory and regulatory obligations.

Depending on the service that is provided we may also collect additional personal information as detailed below;

| Buy, Sell, Let, Rent | |
|---|--|
| Selling or letting a property through us; | <ul style="list-style-type: none"> We will collect and hold a contact telephone number and/or email address from you in order to organise viewings and update you on any offers received for the property. If you are not the legal owner of the property we will request details from you as to your ability to sell or let the property such as a Power of Attorney, Guardianship Order or Grant of Probate. Bank account details will also be collected in order to arrange onward payment of rent monies etc. |
| Renting a property we are listing; | <ul style="list-style-type: none"> We will collect and hold a contact telephone number and/or email address you in order to arrange viewings and communicate about any offers/applications received. When specifically provided, we will collect and hold information relating to any specific access requirements so that we can find a property that is suitable for your needs |

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|---------------------------------------|--|
| | <ul style="list-style-type: none"> • Bank / building / similar account details may be requested and stored, to allow us to manage an approved tenancy deposit account (if required) and to set up rental payments. • References may also be obtained on the individual. |
| Purchasing a property we are listing; | <ul style="list-style-type: none"> • When specifically provided, we will collect and hold information relating to any specific access requirements so that we can find a property that is suitable for individual's needs. • We will also collect personal information required to source a property, which may include proof of relevant financing. |
| Property Management | |
| | <ul style="list-style-type: none"> • Emergency contact information will be requested from the Landlord, or Landlord's representative, in the event there is a matter requiring urgent attention. • Personal information may be shared with third party lenders, as well as utility providers and the Local Authority, as is necessary to allow us to fulfil our obligations to our client and to properly manage and advise the client on their property investments. • The Landlord's bank / building / similar account details will be collected and stored to allow us to forward any rental payments, and/or deposits if necessary. |

4.0 How we use personal data?

Personal information will only be used for the purposes of fulfilling our obligations in relation to the business relationship.

Depending upon the relationship, personal information will be shared with other parties as is necessary to facilitate the deal or job. This may include solicitors and other professionals.

In relation to new lettings, personal information may also be shared with third party referencing agencies for the purposes of the prevention and detection of crime, fraud and/or money laundering and checking suitability.

Where we are a managing property, personal information may be passed onto third party contractors whom we have engaged to carry out maintenance of your property from time to time.

Personal information will be shared with our regulators, governmental or quasi-governmental organisations, law enforcement authorities and with courts, tribunals and arbitrators as may be required from time to time in order to comply with our regulatory and legal obligations.

Personal information may also be shared with third party services providers who process personal information on our behalf in order to provide services to us. This includes IT systems providers and IT contractors as well as third party referencing or screening agencies for the purposes of the prevention and detection of crime.

We may share your personal information with any person working within Underwoods LLP on a need to know basis to ensure we are able to perform our obligations to you.

All individuals on the electronic Client management databases will be required to 'opt-in' to receive any other additional marketing information that may be sent from time to time, that is outside of the existing business relationship. If you subscribe to receive such research, news or other market updates from us, then in addition to above, we may collect details about the type of content that you would like to receive. At any time you are able to alter your marketing preferences, to unsubscribe from additional marketing materials, or to change or close your property enquiry, by clicking the hyperlink at the bottom of the email.

5.0 How do we keep your information secure?

Access to personnel information is strictly controlled and limited to those who are entitled to see it as part of their duties.

6.0 How long do we keep your information for?

The period for which we will keep personal information will depend on the type of service requested from us. The retention period may be longer than the period for which we are providing services to individual where we have statutory or regulatory obligations to retain personal information for a longer period, or where we may need to retain the information in case of a legal claim.

7.0 What are the rights of Data Subjects?

Data Subjects are granted various rights under the Regulations, including;

- the right to be informed
- the right of access
- the right to rectification
- the right to erasure
- the right to restrict processing
- the right to data portability
- the right to object
- rights in relation to automated decision making and profiling

If you would like to exercise any of your rights please email sa@underwoods.co.uk

8.0 Complaints

If you have a complaint about the way in which we use your personal data please contact the Partnership Secretary, sa@underwoods.co.uk and we will try to resolve the issue.