

## **PRIVACY NOTICE**

This policy tells you what to expect when we collect personal information.

Milwyn Jenkins Limited is the 'Data Controller' for the personal information we hold for the purposes of the General Data Protection Regulation (GDPR). The GDPR seeks to protect and enhance the right of data subjects.

This Privacy Notice sets out how Milwyn Jenkins Limited collects and uses any information that you give us.

The expressions 'we', 'us' and 'our' refer to Milwyn Jenkins Limited.

We have appointed a Data Protection Officer to oversee compliance in this matter and if you have any questions about this Privacy Notice, or how we handle your personal information, please contact the Data Protection Officer, Mrs Avril Evans at Cranford House, 1 Severn Square, Newtown, Powys SY16 2AG Telephone No: 01686 626218 Fax: 01686 610047 Email: aevans@milwyn-jenkins.co.uk

It is important that the personal information we hold about you is accurate and current. Please keep us informed if your personal information changes during your relationship with us.

### **1. What is personal data and special category data?**

Personal data is defined in the GDPR as any information relating to an identified or identifiable natural person. It can include obvious data like your name but also identification numbers, online identifiers and/or one or more factors specific to the physical, physiological, genetic, mental, economic, cultural or social identity of that person.

Special category data includes data revealing race or ethnic origin, political opinions, religious or philosophical beliefs, or trade union membership, and genetic data, biometric data, data concerning health or data concerning a person's sex life or sexual orientation.

### **2. Why we collect and how we use your personal information**

- 2.1 We collect and use personal information directly from you and from third parties.
- 2.2 We collect, use and share data for the purposes of providing legal advice and services, to enable us to perform our contract with you, to comply with applicable laws and regulations, to undertake anti-money laundering identity and credit checks, and for accounting and record keeping purposes.
- 2.3 Milwyn Jenkins Limited may share personal information it has about you with third party consultants, contractors or other service providers who may have access to the personal information when providing services to the relevant parties, including but not limited to IT support services, financial institutions, Government bodies, courts and tribunals, legal advisors and barristers, actuaries, accountants and auditors, professional valuers and estate agents and medical experts.

## 2.4 Jobs and employees

When people apply to work with us, we use the information sent to us to process applications and to monitor our recruitment.

To ensure we are an equal opportunities employer we collect information about age, disability, ethnicity, sex, gender reassignment, sexual orientation and religion or belief. This information is not used in relation to the application itself and is treated with strict confidence. We will only use the information to help us monitor and deliver equal opportunity measures. With the exception of the disclosure of a disability which may be used to meet our legal obligations and our commitment to the disability confident scheme.

Successful applicants who secure fixed term or permanent contracts are asked to agree to – where applicable - an appropriate criminal records check. This will be in addition to reference checks and proof of eligibility to work in the UK.

Once a person is employed by us, we compile a file relating to their employment. We keep this information secure and only use it for purposes directly related to their employment. When a person's employment ends with us we destroy the file in line with our retention and disposal policies.

For unsuccessful applicants we keep the information secure and destroy the file in line with our retention and disposal policies.

## 2.5 Complaints about us

When we receive complaints about us we create a complaint file. Usually the file will contain the identity of the person complaining and other people involved in the complaint.

We use personal information to deal with the complaint. We may also use the information to check and improve our level of service. Where we do this we do it to help inform us how to improve the way we work since both we and those we deal with have an interest in us doing so.

We may also prepare and publish or share statistic and research obtained from data we collect such as the number and types of complaints we receive about our service but not in a form that identifies anyone.

We may also share personal information with selected third parties which provide relevant services to us, such as outsourced IT services or legal support but only where this helps us to fulfil effectively our statutory and regulatory functions.

On the request of the person making the complaint, data may be shared with an independent reviewer who is asked to review the way we have handled matters.

## **3 How long we keep information and how we keep information secure**

### 3.1 We have put in place measures to protect the security of your personal information from being accidentally lost, used or accessed in an unauthorised way, altered or disclosed.

We use secure portals and encryption tools where necessary to ensure data transit is protected.

The internet is not a secure medium but we are committed to ensuring that your personal information is secure. In order to prevent unauthorised access or disclosure, we have put in place suitable physical, electronic and managerial procedures to safeguard and secure the personal information we collect online. We will use our best efforts to ensure that no unauthorised parties have access to any of your personal information and we restrict access to non-public information about you to those individuals and entities that need to know the personal information to be able to provide products and services to you.

The security measures in place include, but are not limited to:

- ) Building security
- ) Physical file security
- ) Locked deeds room
- ) Locked filing units
- ) Confidential waste disposal
- ) Destruction of files by confidential waste disposal
- ) Robust antivirus, anti-malware & firewall software is installed and maintained on all computers
- ) Email traffic & client data are held on our own dedicated secure servers.
- ) Workstations are locked and password-protected when users are away from their desks.

#### **4 Your rights**

Under the GDPR, you have certain rights in respect of the processing of your personal information, which may vary dependent on the legal basis for collection of your personal information and the uses made of this personal information.

For all uses made of your personal information, you have the right to be informed about how we use your personal information and this notice discharges that obligation. However, further rights may apply in different circumstances, as set out below:

Right of access – you have a right to access a copy of the personal information that is held about you (subject to Data Protection Laws) free of charge in most circumstances and on production of proof of identity.

Right of rectification – you have the right to correct personal information that is held about you if it is inaccurate or incomplete.

Right to erasure – in certain circumstances you can ask for the personal information held about you to be erased (please note our retention period set out below).

Right to restrict processing – where certain conditions apply you have a right to restrict processing

Right to data portability – where you have the right to have the personal information held about you transferred to another organisation, where applicable Milwyn Jenkins will provide copies of personal information in a structure commonly used, and machine readable form.

Right to object – you have the right to object to certain types of processing, such as marketing (please note that we do not use your information for marketing purposes).

Right to withdraw consent – in the limited circumstances where you may have provided your consent to the collection, processing and transfer of your personal information for a specific

purpose, you have the right to withdraw your consent for that specific processing at any time. To withdraw your consent, please contact the Data Protection Officer.

In the event you wish to exercise any of these rights, please make your request in writing to the Data Protection Officer.

**5. Data Retention Periods**

We will only retain your personal information for the duration of our agreement with you and for as long as necessary to fulfil the purposes we collect it for, including the purposes of satisfying any legal, accounting and insurance purposes.

Our standard file disposal period is a minimum of 12 years for probate files and 6 years for other files.

**6. Will your information be transferred to other countries?**

International transfer of data will generally only arise in very limited circumstances. We require third parties to respect the security of your personal information and to treat it in accordance with the law.

**7. Reporting concerns about how we deal with your data**

If you have any questions about this Privacy Notice or wish to make a complaint about how your personal information is being processed by Milwyn Jenkins you should contact the Data Protection Officer.

You also have the right to lodge a complaint with the Information Commissioners Office (ICO) who are the relevant supervisory authority.