

## **Privacy Policy**

### **1. Purpose of this policy**

At Chilcotts Law, we are committed to protecting your personal data and respecting your privacy. This Privacy Policy explains who we are, what personal data we collect, how and why we use it, and how we keep it secure. It also outlines your rights under data protection law and provides details on how to contact us or the relevant supervisory authority if you have any concerns.

As a firm regulated under the UK General Data Protection Regulation (UK GDPR), we act as a 'controller' of your personal data. This means we are responsible for how your data is collected and used. Our processing of your data is governed by your instructions, the UK GDPR and related legislation, and our overriding professional duty of confidentiality.

This Policy may change from time to time to comply with guidance and regulation and therefore should be reviewed regularly. This policy was last reviewed in June 2026.

#### **Key terms:**

- "We, us, our" refers to Chilcotts Law.  
"Data Protection Officer" means the person responsible for data protection compliance.
- "Personal data" means any information relating to an identified or identifiable individual.
- "Special category personal data" means personal data revealing racial or ethnic origin, political opinions, religious beliefs, trade union membership, genetic data, biometric data, health data, or data concerning a person's sex life or sexual orientation.

We typically retain personal data for at least 6 years after the conclusion of your matter, unless a longer period is required by law or regulation.

Occasionally, we may also use your information to contact you for market research regarding our services. However, we will only do this if you specifically consent and opt into this service.

We may share personal data with trusted third-party service providers where necessary to provide our services and operate our business efficiently. These may include cloud-based legal practice management systems, document management providers, Microsoft 365 services, IT support providers, legal technology providers, identity verification and AML screening providers, and other professional service providers. We ensure appropriate contractual, technical and organisational safeguards are in place before any such sharing takes place.

Where appropriate, we may use AI-assisted tools and legal technology solutions to support the delivery of our services. Any use of such tools will be subject to appropriate confidentiality, security and data protection safeguards.

#### **How to contact us**

If you have any questions about this Privacy Policy or want to exercise your rights set out in this Privacy Policy, please contact us by:

David Wilde, our Data Protection Officer:

- email: [dpo@chilcottslaw.com](mailto:dpo@chilcottslaw.com)
- telephone 01822 612535

## **2. What information do we collect**

We may collect information in the course of providing legal services to you or as a result of our day-to-day dealings with you or any of our clients. We will collect your data in the following ways:

The personal information we collect will depend on the nature of your instructions, but may include:

- Your name, address, and contact details (including telephone number and email address)
- Information to verify your identity, such as your date of birth, passport details, or other identification documents
- Details relevant to the matter in which you are seeking legal advice or representation
- Financial information relevant to your instructions, for example the source of funds in a property transaction
- National Insurance number and tax-related information
- Bank or building society account details
- Information about your professional online presence, if relevant
- Details of your spouse, partner, dependants, or other family members—for example, in relation to family law matters or will instructions
- Employment information, including your employment status, salary, and benefits where relevant
- Nationality, immigration status, and related documentation where applicable
- Pension information, where relevant to your instructions
- Employment records, such as sickness and attendance details, where disclosed during the course of our work
- Medical or health information—for instance, if we are advising you in a community care or related matter

### 3. How we use your personal information

Under data protection law, we may only use your personal data where we have a lawful basis. This means one or more of the following applies:

- To comply with our legal and regulatory obligations.
- For the performance of our contract with you, or to take steps at your request before entering into a contract.
- For our legitimate interests or those of a third party (provided these are not overridden by your rights and freedoms).
- Where you have given your consent.

A **legitimate interest** means we have a business or commercial reason to use your data, provided it doesn't unfairly impact your rights.

Please refer to the section on *Special Category Personal Data* for information on how we handle sensitive data.

What we use your personal data for	Our reasons
To provide legal services to you	For the performance of our contract with you or to take steps at your request before entering into a contract
Conducting identity verification and sanctions screening	Compliance with legal and regulatory obligations
Meeting legal obligations, including those from regulators (e.g. SRA), or health and safety laws	Compliance with legal and regulatory obligations
Responding to audits, enquiries or investigations by regulatory authorities	Compliance with legal and regulatory obligations
Adhering to business policies (e.g. IT security, internet use)	Legitimate interests – to ensure internal policies are followed
Operational efficiency, training, and quality control	Legitimate interests – to improve business effectiveness
Protecting confidential or commercially sensitive information	Legitimate interests – to safeguard intellectual property Compliance with legal and regulatory obligations

Statistical analysis (e.g. client trends, work types, financial performance)	Legitimate interests – to manage and improve our services
Preventing unauthorised access or modification of systems	Legitimate interests – to prevent criminal activity Compliance with legal and regulatory obligations
Updating client records	Performance of a contract Compliance with legal and regulatory obligations Legitimate interests – to stay in contact with clients
Statutory returns and filings	Compliance with legal and regulatory obligations
Ensuring safe working practices and managing staff	Compliance with legal and regulatory obligations. Legitimate interests – to operate efficiently
Marketing our services to existing or former clients, or to interested third parties	Legitimate interests – to promote our services (you may opt out at any time)
External audits and quality checks (e.g. for CQS or SRA purposes)	Legitimate interests – to maintain standards and accreditation. Compliance with legal and regulatory obligations

#### **4. Special Category Personal Data**

We may need to collect and process special category personal data in the course of providing legal services to you. This data will only be processed where necessary for the matter on which you have instructed us and where a lawful condition for processing under Article 9 UK GDPR applies.

Depending on the circumstances of your matter, this may include processing that is necessary for the establishment, exercise or defence of legal claims, the administration of justice, compliance with legal obligations, the provision of legal advice, or another condition permitted under applicable data protection legislation.

Where appropriate, we may share this data with professionals and experts involved in your matter, as well as relevant courts, tribunals, government departments, regulatory bodies, healthcare providers or other organisations where necessary to progress your instructions or comply with legal obligations.

#### **5. How Your Personal Data is Collected**

We collect most of this information directly from you. However, we may also collect personal data from other sources, including:

Publicly accessible sources, such as Companies House, HM Land Registry, or the Electoral Register.

Third parties, including:

- Sanctions screening providers and client due diligence services – to carry out identity verification, anti-money laundering (AML) checks, and ensure compliance with financial sanctions and other regulatory obligations.
- Other third parties with your consent, such as:
  - your bank, building society, or financial advisor.
  - consultants and other professionals we engage in connection with your matter.
  - your doctors or other medical and occupational health professionals.
- Our information technology (IT) systems, including:
  - case and document management systems.
  - door entry systems and visitor logs.
  - our computer networks, communications tools (such as email, Microsoft Teams, SMS), CCTV, and access control systems.

## **6. How and Why, We Use Your Personal Data**

Under data protection law, we may only use your personal data where we have a lawful basis. This means one or more of the following applies:

To comply with our legal and regulatory obligations.

For the performance of our contract with you, or to take steps at your request before entering into a contract.

- to set you up as a client
- to communicate with you
- to update you on services and benefits
- to better understand who uses the website and the pages they access so as to be able to improve the website, and
- to help us understand your needs and interests and provide you with a better service
- to manage our business to prevent money laundering and/or terrorist financing
- for any other legitimate use in the course of our business
- to enforce or protect our rights.
- In order to comply with legal obligations

Occasionally, we may also use your information to contact you for market research regarding our services. However, we will only do this if you specifically consent and opt into this service.

The law requires us to have a legal basis for collecting and using your personal data. We rely on one or more of the following legal bases:

- Performance of a contract with you: Where we need to perform the contract, we are about to enter into or have entered into with you.
- Legitimate interests: We may use your personal data where it is necessary to conduct our business and pursue our legitimate interests, for example to prevent fraud and enable us to give you the best and most secure customer experience. We make sure we consider and balance any potential impact on you and your rights (both positive and negative) before we process your personal data for our legitimate interests. We do not use your personal data for activities where our interests are overridden by the impact on you (unless we have your consent or are otherwise required or permitted to by law).
- Legal obligation: We may use your personal data where it is necessary for compliance with a legal obligation that we are subject to. We will identify the relevant legal obligation when we rely on this legal basis.
- Consent: We rely on consent only where we have obtained your active agreement to use your personal data for a specified purpose, for example if you subscribe to an email newsletter.
- For our legitimate interests or those of a third party (provided these are not overridden by your rights and freedoms).
- Where you have given your consent.
- A legitimate interest means we have a business or commercial reason to use your data, provided it doesn't unfairly impact your rights.

Please refer to the section on Special Category Personal Data for information on how we handle sensitive data.

Please note: the above applies to general personal data. Special category personal data will only be processed where a relevant condition under Article 9 UK GDPR and, where applicable, Schedule 1 of the Data Protection Act 2018 applies. This may include processing necessary for the establishment, exercise or defence of legal claims, the administration of justice, the provision of legal advice, compliance with legal obligations, or where you have provided explicit consent where consent is the appropriate legal basis.

## **7. Promotional Communications**

We may use your personal data to send you updates by email, or post about legal developments that might be of interest to you and/or information about our services, including any new services that we may be offering.

We have a legitimate interest in processing your personal data for promotional purposes (see above 'How and why we use your personal data'). This means we do not usually need your consent to send you promotional communications. However, where consent is needed, we will ask for this consent separately and clearly.

We will always treat your personal data with the utmost respect and never share it with other organisations for marketing purposes.

You have the right to opt out of receiving promotional communications at any time by:

- contacting us by emailing David Wilde, our Data Protection Officer, email [dpo@chilcottslaw.com](mailto:dpo@chilcottslaw.com)
- using the 'unsubscribe' link in emails

We may ask you to confirm or update your marketing preferences if you instruct us to provide further services in the future, or if there are changes in the law, regulation, or the structure of our business.

## **8. Cookies and Website Tracking**

Our website uses cookies to enhance your experience and analyse site traffic. For detailed information about the cookies, we use and how to manage them, please refer to our <https://chilcottslaw.com/cookie-policy/>

## **9. Who We Share Your Personal Data With**

We routinely share personal data with:

- professional advisers who we instruct on your behalf or refer you to, e.g. barristers, medical professionals, accountants, tax advisors or other experts.
- other third parties where necessary to carry out your instructions, e.g. your mortgage provider or HM Land Registry in the case of a property transaction or Companies House.
- our insurers and brokers.
- external auditors, e.g. in relation to the Law Society CQS accreditation and the audit of our accounts.
- our banks

- external service suppliers, representatives, and agents that we use to make our business more efficient, e.g. typing services, photocopying service, marketing agencies, document collation.

We only allow our service providers to handle your personal data if we are satisfied, they take appropriate measures to protect your personal data. We also impose contractual obligations on service providers relating to ensure they can only use your personal data to provide services to us and to you.

We may disclose and exchange information with law enforcement agencies and regulatory bodies to comply with our legal and regulatory obligations.

We may also share personal data with technology providers and software suppliers used to support the delivery of our legal services and business operations, subject to appropriate contractual and data protection safeguards.

We will not share your personal data with any other third party beyond those listed above, unless required by law or with your explicit consent.

#### **10. Where Your Personal Data is Held**

Your information is held securely at our offices and may also be stored or processed by trusted third-party service providers, agents, or representatives as described above (see 'Who we share your personal data with').

Some of these third parties may be based outside the UK or the European Economic Area (EEA). For more details on how we protect your data in such cases, please see 'Transferring your personal data outside the UK/EEA' below.

#### **11. Transferring Your Personal Data Outside the UK/EEA**

To deliver our services, it may sometimes be necessary to transfer your personal data to countries outside the UK or EEA, for example:

- when you or our service providers are located outside the UK/EEA.
- where there is an international aspect to your matter.

These transfers are made in compliance with UK GDPR rules on international transfers. Where applicable, we will ensure appropriate safeguards are in place, such as:

- data transfer agreements based on standard contractual clauses approved by the UK or EU;
- confirmation that the receiving country provides an adequate level of data protection.

#### **12. How Long Your Personal Data Will Be Kept**

We retain your personal data after we have finished advising or acting for you in order to:

- respond to any questions, complaints or claims made by you or on your behalf.
- demonstrate that we treated you fairly.
- comply with legal and regulatory record-keeping obligations.

We do not keep personal data for longer than necessary. Retention periods vary depending on the nature of the matter and data involved. Full details are provided in our client care letter or terms of business, typically at least 6 years post-matter.

When data is no longer needed, we will safely delete or anonymise it.

### **13. Your Rights**

You have the following rights, which you can exercise free of charge:

- The right to be informed about how your personal data is used
- The right of access to your personal data
- The right to have inaccurate personal data corrected
- The right to have personal data erased in certain circumstances
- The right to restrict the processing of personal data in certain circumstances
- The right to object to the processing of personal data in certain circumstances
- The right to data portability where applicable
- Rights relating to automated decision-making and profiling

For further information on each of these rights, including the circumstances in which they apply, please contact us or refer to the Information Commissioner's Office (ICO) guidance on individual rights under UK GDPR, available at <https://ico.org.uk/for-the-public/>.

If you would like to exercise any of these rights, please:

- Complete a data subject request form (available from our Data Protection Officer)
- Contact our Data Protection Officer by post, email or telephone (see 'How to contact us')
- Provide enough information to identify you (e.g. name, address and reference number)
- Provide proof of identity and address (e.g. a copy of your passport or driving licence and a recent utility bill)
- Specify which right you wish to exercise and what it relates to

### **14. Keeping Your Personal Data Secure**

We take data security seriously. We use appropriate technical and organisational measures to protect personal data from accidental loss, unauthorised access, or misuse.

Access to your data is limited to those with a genuine business need and who are subject to confidentiality obligations. We also have procedures in place to manage and respond to any data security breaches. Where legally required, we will notify you and the appropriate regulator.

For practical tips on staying safe online, visit <https://www.getsafeonline.org>— supported by the UK Government and leading businesses.

## 15. Data Protection Complaints

If you have concerns about how Chilcotts Law has collected, used, stored, disclosed or otherwise processed your personal data, please contact our Data Protection Officer using the contact details set out in this Privacy Policy. We will investigate your concerns in accordance with our Data Protection Complaints Procedure.

If you remain dissatisfied following our response, you have the right to complain to the Information Commissioner's Office (ICO).

ICO website: <https://ico.org.uk/make-a-complaint/>

Telephone: 0303 123 1113

Address: Information Commissioner's Office, Wycliffe House, Water Lane, Wilmslow, Cheshire SK9 5AF

You may also lodge a complaint with a supervisory authority in the EEA country where you live, work, or where you believe your data protection rights have been infringed.

## 16. Changes to This Privacy Policy

This privacy policy was first published on 11 May 2018 and last updated in June 2026.

We may update this privacy policy from time to time to reflect changes in legal, regulatory or operational requirements. The latest version will always be available on our website.

## 17. How to Contact Us

Please contact us by post, email, or telephone if you have any questions about this privacy policy or the information, we hold about you.

Our contact details are shown below:

<b>Our contact details</b>	<b>Our Data Protection Officer's contact details</b>
Chilcotts Law 10 Plymouth Road	David Wilde Director, COLP, DPO

Tavistock	Email: <a href="mailto:dpo@chilcottslaw.com">dpo@chilcottslaw.com</a>
Devon	Tel: 01822 612535
PL19 8AY	
Tel: 01822 612535	

### **18. Do You Need Extra Help?**

If you would like this policy in another format (for example audio, large print, braille, email) please contact us (see 'How to contact us' above).

### **19. Client Consent and Acknowledgement**

I acknowledge that I have read and understood the Chilcotts Law Privacy Policy and understand how my personal data, including special category personal data where relevant, may be processed in connection with the legal services provided to me.

Name: \_\_\_\_\_

Date: \_\_\_\_\_

Signature: \_\_\_\_\_