

TEMPLEMEAD PROPERTY SOLUTIONS LIMITED

Privacy Information Notice



Regulated by RICS

A CURTIS BANKS
GROUP COMPANY

YOUR FUTURE, OUR FOCUS.
templemead.co.uk

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This Privacy Information Notice describes how the Curtis Banks Group will collect, use and protect your personal information. It applies to any website, applications and products or services offered by the Curtis Banks Group and referred to in this Privacy Information Notice.

1 Who we are

Templemead Property Solutions Limited of 3 Temple Quay, Bristol, BS1 6DZ is the **Data Controller**. Templemead Property Solutions Limited is accredited by the Royal Institution of Chartered Surveyors (RICS).

Templemead Property Solutions Limited is part of Curtis Banks Group plc which also includes Curtis Banks Limited, Suffolk Life Annuities Limited, Suffolk Life Pensions Limited and associated companies ("the Curtis Banks Group"), any of whom may act as **Data Processors**.

The Data Protection Officer (DPO) for the Curtis Banks Group is Renata Chester (DPO@curtisbanks.co.uk or Tel 0117 910 7910).

Expression What it means in this document

Data Controller	the person (or business) who determines the purposes and means of processing personal information.
Data Subject	you, a living person who is the subject of personal data and to whom personal data relates.
EEA	European Economic Area which is made up of EU countries plus Norway, Iceland and Liechtenstein.
agent*	you, a person appointed to act on behalf of another in relation to a product or service offered by the Curtis Banks Group. This includes the trustees of the pension scheme of which you are a member.
property tenant*	you, a person or the nominated contact of a legal person who occupies a property.
Third Party	you, a person who undertakes or is appointed to carry out a function or service for a Data Subject . This definition includes, but is not limited to, all third parties noted within this glossary.
we/us/our	Templemead Property Solutions Limited.

* Together referred to as "Third Party" in this Privacy Information Notice.

2 Why we need to collect, use and process personal information

We collect personal information from you in order to perform our contractual obligations when you or your **agent** instructs us to provide professional property valuation and landlord and tenant services or other products and services (our services).

When you or your **agent** instructs us to provide our services you understand that we will be processing your personal data for the purpose set out above.

3 The information we may collect, hold and process about you

- Title;
- Full name;
- Permanent residential address and correspondence address (if different);
- Telephone contact number(s);
- Email address;
- **Agent** details;
- Supporting information to verify your identity and address;
- All communications to and from you by telephone, email, post or otherwise.

4 How we use your personal information

- To process and undertake your instructions for the requested products or services;
- To contact you to arrange for the inspection of the property;
- To comply with legal, regulatory or professional requirements;
- For the detection, prevention and investigation of illegal or prohibited criminal activities and in the protection of our legal rights (including liaison with regulators and law enforcement agencies);
- To provide you with access to applications in relation to the products or services you have requested;
- To notify you about changes to our products or services;
- To administer the website and to carry out internal benchmark testing and systems monitoring (e.g. statistical and data analysis, troubleshooting faults or issues, service monitoring and for survey purposes), in order to improve the use, presentation, performance and security of the services;
- For market research, statistical analysis, customer profiling and in the development of our products and services; and
- To send you details by post, email, telephone or any other electronic means, of applications, products, services we supply and events we host which we believe may be of interest to you, but only if you have given us prior consent (this may include sending your details to third parties who may provide some services on our behalf).

5 How we collect information

You may give us information by filling in forms (in paper or on our website) or by corresponding with us by:

- Phone;
- Email;
- Post; or
- by any other electronic means.

This includes information you provide when you:

- Search our website;
- Apply for products or services; or
- Enter a promotion and/or participate in a survey or any other interaction with our website (including occasions when you report a problem with the websites).

We may also receive personal information from third parties who we work closely with and who are entitled to share that information (e.g. credit agencies, search information providers, business partners, banking and related service providers, analytics providers, public sources or any other service providers), but in each case, as permitted by applicable law.

Each time you visit the Curtis Banks Group websites we may automatically collect the following information:

- Technical information, including the Internet Protocol (IP) address used to connect your computer to the internet, your login information, browser type and version, time zone settings, browser plug-in types and versions, operating systems and platforms, etc.; and
- Information about your visit, including the full Uniform Resource Locators (URL) of the internet sites you came through to our websites and which pages you visited (including date and time); page response times; download errors; length of visits to certain pages; page interaction information; methods used to browse away from the page.

6 Disclosure of your information

We may share your personal data (including storage and transfer of data) with:

- Any members of the Curtis Banks Group for the purposes set out in this Privacy Information Notice;
- Agents selected by you and for whom you have given prior consent for us to share personal information;
- Your co-trustees and/or co-owners of your pension scheme investments.
- Any third party in order to meet our legal, regulatory and professional obligations, including statutory or regulatory bodies, law enforcement agencies, credit reference agencies and company auditors;
- Our service providers and agents (including their sub-contractors) or third parties who process information on our behalf in relation to, for example, banks for processing payments, printing services, bulk communication purposes and internet services;
- Any third party in the context of actual or threatened legal proceedings provided we can do so lawfully; and
- Third parties to whom we sell or negotiate to sell our business or assets.

7 Data retention

We may retain information about you:

- After the completion of the services you have instructed us to provide; or
- Where you decide not to proceed.

This information will only be held for as long as is necessary to meet any legal, insurance, regulatory or fraud prevention requirements and for our lawful business processing. We regularly review our records to ensure that we only retain your personal information for as long as is necessary for the purposes set out in this Privacy Information Notice.

Please note: where we no longer need your personal information, we will dispose of it in a secure manner (without further notice to you). You can find more information in our Retention Policy.

8 Automated decisions

We may use your personal data to undertake automated online identity checks and in the detection, prevention and investigation of illegal or prohibited criminal activities.

9 Mobile data

We may obtain information through mobile applications that we may offer and you or your agents use to access our websites, applications and services. Mobile applications for this purpose may be provided by us or third parties.

Where mobile applications are provided by a third party, you must read that third party's own privacy information notice in relation to that application. We are not responsible for third party mobile applications and their use of your personal information.

10 Marketing

From time to time, where you have provided consent, we may use your personal information to contact you by telephone, post, email or by any other electronic means, with details about our applications, events, products and services, which we feel may be of interest to you.

11 Transfers outside of the European Economic Area

The data that we collect from you may be transferred to, and stored at a destination outside the EEA. It may also be processed by our service providers (and their employees) operating outside the EEA.

We take steps to ensure that in the event that your information is transferred outside of the EEA by our service providers, appropriate measures and controls are in place to protect that information in accordance with applicable data protection laws and regulations in the UK.

12 Security and storage of information

The security and storage of your personal information is very important to us.

The personal information we collect from you is stored by us on secure servers, protected through a combination of physical and electronic access controls, firewall technology and other security measures. In addition, when we create payment instructions and pass them to our banking partners, they will be encrypted using secure technology. We have put in place measures to guard against unauthorised or unlawful processing and against accidental loss, destruction or damage.

If you (or your agent) contacts us for details of the services we are instructed to provide to you, we will ask some questions to establish your (or your agent's) identity and will not disclose any personal and/or other information, under any circumstances, unless we are satisfied that you (or your agent) are who you claim to be.

Although we use market standard security software to protect your personal information, we cannot guarantee the security of your data transmitted by you or your agent to our websites, secure portals, applications or services; any transmission is at your own risk. Once we have received your information, we will use strict procedures and security features to try to prevent unauthorised access.

13 Cookies (small text files)

The Curtis Banks Group websites use cookies to distinguish you from other users of our websites to help us improve our applications and services.

For detailed information on the cookies we use and the purposes for which we use them, please see our Cookie Policy.

14 Your information and your rights

You have the following rights:

- To be informed about how we obtain and use your information;
- To ask for a copy of the information that we hold about you;
- To have your information rectified;
- To request us to restrict processing of your personal data;
- To request to have your information erased (Right to be forgotten);
- To object to the processing of your information (e.g. for direct marketing purposes);
- To have information you provided to us, returned to you or sent directly to another company, in a structured, commonly used and machine-readable format where technically feasible (Data Portability);
- Where the processing of your information is based on your consent, the right at any time to withdraw that consent;
- To object to any decisions based on the automated processing of your personal data, including profiling; and
- To lodge a complaint with the Information Commissioner's Office (ICO), the supervisory authority responsible for data protection matters.

You cannot opt out of receiving regulatory or legal information or updates (e.g. information about a change to our product terms and conditions).

If you withdraw your consent to the processing of your personal information or you ask for your information to be erased, we may not be able to provide you with access to all or parts of our website, applications, products or services.

If you would like to exercise any of your rights please contact clientrelations@curtisbanks.co.uk or the Data Protection Officer DPO@curtisbanks.co.uk.

15 Other sites and social media

If you follow a link from our websites, applications or services to another site or service, this Privacy Information Notice will no longer apply. We are not responsible for the information handling practices of third party sites or services and we encourage you to read the privacy information notices appearing on those sites or services.

16 Electronic mail containing personal information

You and your agents may, from time to time, send personal information to us electronically. We are not responsible for the way in which you or your agent handles personal information. Where possible, we insist that you or your agent communicate using either secure/encrypted email. Please refer to clause 12 of this Privacy Information Notice regarding the security of information not sent via secure means.

When we communicate personal information with you or your agent through electronic means we will ensure that it is done so securely using either encrypted files or secure messaging.

17 Changes to our Privacy Information Notice

We may change, modify or adjust this Privacy Information Notice from time to time; however we will not reduce your rights under this Privacy Information Notice.

Any changes we may make to our Privacy Information Notice in the future will be found on our website www.templemead.co.uk. Copies are also available from us by post. Please contact us if you require a copy.

18 Contact us

We take your privacy and protection of your personal information very seriously. If you have any questions, comments or queries about the way we are collecting or using your personal information please contact the Data Protection Officer at the Curtis Banks Group, Head Office, 3 Temple Quay, Bristol, BS1 6DZ or email us at DPO@curtisbanks.co.uk.

If you have a concern about the way in which we are collecting or using your personal information you may also contact the Information Commissioner's Office directly at <https://ico.org.uk/concerns/>.



Notes



Notes

Templemead Property Solutions Limited,
3 Temple Quay,
Bristol, BS1 6DZ
templemead.co.uk

This document shall be governed by and construed in accordance with the laws of England & Wales. It is based on our current understanding of regulations and can be subject to change as legislation may change over time.

If you're contacting us by email, please remember not to send any personal, financial or banking information because email is not a secure method of communication.

Templemead Property Solutions Limited (registered number 11216858) is a company registered in England & Wales with their registered address at 3 Temple Quay, Bristol, BS1 6DZ. Templemead Property Solutions Limited is a member of the Curtis Banks Group. Templemead Property Solutions Limited is authorised and regulated by the Royal Institution of Chartered Surveyors under number 810829.
TMPLMD PIN 1018

