



Gardner
Leader

Privacy Policy

Introduction

Welcome to the Gardner Leader's privacy notice.

Gardner Leader respects your privacy and is committed to protecting your personal data. This privacy notice will inform you as to how we look after your personal data when you visit our website (regardless of where you visit it from) or any of our offices, when we provide legal services or when we carry out recruitment activity. It also tells you about your privacy rights and how the law protects you.

This privacy notice is provided in a layered format so you can click through to the specific areas set out below. Please also use the Glossary to understand the meaning of some of the terms used in this privacy notice.

1. Important information and who we are

Purpose of this privacy notice

This privacy notice aims to give you information on how Gardner Leader collects and processes your personal data in connection with any:

- **Website activity:** when you visit our website (regardless of where you visit it from) including any data you may provide when you contact us via our web form, sign up to receive our newsletter, articles, insights, obtain a conveyancing e-quote, take part in a survey or provide us with feedback;
- **Client Services:** the provision of legal services by Gardner Leader to prospective or actual clients;
- **Visitor Services:** the provision by Gardner Leader of office-related facilities, including use of conference rooms, video-conferencing, visitor WiFi and other relevant services made available to visitors to any of Gardner Leader's offices; and
- **Recruitment activity:** provision of the personal data of a candidate (whether by such candidate or by a third party, such as a recruitment agency) for a position at Gardner Leader.

It is important that you read this privacy notice together with any other privacy notice or fair processing notice we may provide on specific occasions when we are collecting or processing personal data about you so that you are fully aware of how and why we are using your data. This privacy notice supplements the other notices and is not intended to override them.

Controller

Gardner Leader LLP is the controller and responsible for your personal data (collectively referred to as "Gardner Leader", "we", "us" or "our" in this privacy notice).

We have appointed Chris Felton as Data Protection Compliance Partner ("DPCP") who is responsible for overseeing questions in relation to this privacy notice. If you have any questions about this privacy notice, including any requests to exercise your legal rights, please contact the DPCP using the details set out below.

Contact details

Our full details are:

- Full name of legal entity: Gardner Leader LLP
- Email address: privacy@gardner-leader.co.uk
- Postal address: 20-24 Market Place, Newbury, Berkshire, RG14 5BA
- Telephone number: +44 (0) 1635 508080

You have the right to make a complaint at any time to the Information Commissioner's Office (ICO), the UK supervisory authority for data protection issues (www.ico.org.uk). We would, however, appreciate the chance to deal with your concerns before you approach the ICO so please contact us in the first instance.

Changes to the privacy notice and your duty to inform us of changes

This version was last updated on 11 November 2021 and historic versions can be obtained by contacting us.

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

Website third-party links

Our website may include links to third-party websites, plug-ins and applications. Clicking on those links or enabling those connections may allow third parties to collect or share data about you. We do not control these third-party websites and are not responsible for their privacy statements. When you leave our website, we encourage you to read the privacy notice of every website you visit.

2. The data we collect about you

Personal data, or personal information, means any information about an individual from which that person can be identified. It does not include data where the identity has been removed (anonymous data).

Special Categories of Personal Data includes details about your race or ethnicity, religious or philosophical beliefs, sex life, sexual orientation, political opinions, trade union membership, information about your health and genetic and biometric data. We do not knowingly collect such data through our website but, in certain limited circumstances, we collect special categories of personal data about you. Please see below in this Section 2 (The data we collect about you) for details of these circumstances and Section 4 (How we use your personal data) for further details.

In limited circumstances, we will collect information about your criminal convictions and offences. This happens where we are required to do so for legal or regulatory purposes (for example, where required pursuant to anti-money laundering laws) or where you have provided us with such information as it is necessary for a specific legal service we are providing.

We may collect, use, store and transfer different kinds of personal data about you which we have grouped together follows:

- **Identity Data** includes first name, middle names, last name, maiden name, title, marital status, gender date of birth, username or similar identifier, passport number and photographic identification.
- **Contact Data** includes billing address, postal address, email address and telephone numbers.
- **Financial Data** includes your bank account and payment card details together with details about payments to and from you and other details of the services you have obtained from us.
- **Professional Information** includes your job title, email address, telephone number, work addresses and your previous positions, professional experience, qualifications and existing benefits.
- **Special Categories of Personal Data** includes the types of personal data listed above in this Section 2 which we process in limited circumstances for the following reasons:
 - for legal and regulatory purposes, for example, we may need to verify whether you are a politically exposed person;
 - to provide you with legal services in respect of employment, child protection, family, personal injury, litigation or criminal matters; and
 - to ask you for your dietary requirements if we are arranging catering for you.

- **Technical Data** includes internet protocol (IP) address, your login data, browser type and version, time zone setting and location, browser plug-in types and versions, operating system and platform and other technology on the devices you use to access this website.
- **Profile Data** includes your usernames and passwords, purchases of services made by you, your interests, preferences, referral website, feedback and survey responses.
- **Usage Data** includes information about how you use our website, use of our visitor WiFi and similar electronic services.
- **Marketing and Communications Data** includes your preferences in receiving marketing from us and our third parties and your communication preferences.

Our website is not intended for children and we do not knowingly collect data relating to children through our website. In addition, our legal services are neither aimed at nor intended for children. However, we may process children's personal data when we act for you in relation to certain personal injury, litigation or private client matters (for instance, when we are advising you regarding your inheritance taxes or a will). In such situations, we act on behalf of the parent or guardian and only process such personal data where necessary for the specific client services we are providing.

We also collect, use and share **Aggregated Data** such as statistical or demographic data for any purpose. Aggregated Data may be derived from your personal data but is not considered personal data in law as this data does **not** directly or indirectly reveal your identity. For example, we may aggregate your Usage Data to calculate the percentage of users accessing a specific feature of our website. However, if we combine or connect Aggregated Data with your personal data so that it can directly or indirectly identify you, we treat the combined data as personal data which will be used in accordance with this privacy notice.

If you fail to provide personal data

Where we need to collect personal data by law (for example, in relation to anti-money laundering checks), or under the terms of a contract we have with you and you fail to provide that data when requested, we may not be able to perform the contract we have or are trying to enter into with you (for example, to provide you with legal services). In this case, we may have to cancel a service you have with us but we will notify you if this is the case at the time.

3. How is your personal data collected?

- **Direct interactions.** You may give us your Identity Data, Contact Data, Financial Information, Professional Information, Technical Data, Profile Data, Usage Data and Marketing and Communications Data by filling in forms or by corresponding with us by post, phone, email or otherwise, or whilst visiting our offices. This includes, for example, personal data you provide when you:
 - enquire about our client services;
 - provide us with personal data necessary for a specific client service we are performing for you, or for the purposes of our anti-money laundering and other background checks (including credit reference checks).
 - obtain a conveyancing e-quote via our website;
 - gain access to and use our online portal (for clients only);
 - subscribe to our various publications (via our website or otherwise);
 - request marketing to be sent to you (via our website or otherwise);
 - give us your business card at a meeting or event, or otherwise
 - personally give us your personal data (for example, by leaving your contact details at the reception of one of our offices or with our switchboard);
 - participate in client seminars or related events;
 - participate in recruitment, marketing or other promotional events;
 - take part in a survey (via our website or otherwise); or
 - give us some feedback (via our website or otherwise).
- **Automated technologies or interactions.** As you interact with our website, we may automatically collect Technical Data about your equipment, browsing actions and patterns. We collect this personal data by using cookies, server logs and other similar technologies. Please see our cookie policy for further details.
- **Third parties sources.** We may receive personal data about you from various third parties sources as set out below:
 - Identity Data, Contact Data, Financial Data, Professional Information and Special Categories of Personal Data when we conduct our anti-money laundering and other background checks (including credit reference checks).
 - Identity Data, Contact Data, Financial Data, Professional Information and Special Categories of Personal Data when you give your personal data to a third party for the purpose of sharing it with us (for example, recruitment agencies may give your personal data to us for recruitment activities);
 - Identity Data, Contact Data, Financial Data, Professional Information and Special Categories of Personal Data when we engage with regulatory or governmental bodies in relation to you or on your behalf (for example, HM Revenue and Customs)



- Technical Data from the following parties:
 - analytics providers such as Google;
 - advertising networks such as social media networks; and
 - search information providers Google.
- Contact, Financial and Transaction Data from providers of technical, payment and delivery services.
- Identity and Contact Data from data brokers or aggregators.
- **Publicly available sources.** We collect Identity Data, Contact Data, Financial Data, Professional Information from publicly available sources, including from:
 - public registers of companies, charities, law firms, chartered accountants and other entities (for example, Companies House in the United Kingdom);
 - public registers of individuals (for example, electoral registers);
 - public registers of sanctioned persons and entities (for example, HM Treasury in the United Kingdom);
 - other public sources (including any services accessible on the Internet) which you are using for professional networking purposes, for example LinkedIn.

4. How we use your personal data?

We will only use your personal data when the law allows us to. The table below sets out further information about the legal bases that we rely on to process your personal data.

We use your personal data in the following circumstances:

- For the purpose of preventing money laundering or terrorist financing.
- Performance of a contract - where we need to perform the contract we are about to enter into or have entered into with you.
- Legitimate interests - where it is necessary for our legitimate interests (or those of a third party) and your interests and fundamental rights do not override those interests.
- Legal or regulatory obligation - where we need to comply with a legal or regulatory obligation.
- Consent - where you have provided your consent to processing your personal data.

With some exceptions (for example, in relation to some of our electronic marketing), we generally do not rely on consent as a legal basis for processing your personal data. You have the right to withdraw consent to marketing at any time by contacting us. Please see [Marketing section](#) below for more information about how we use your personal data for marketing purposes and your rights.

Purposes for which we will use your personal data

We have set out below, in a table format, a description of all the ways we plan to use your personal data, and which of the legal bases we rely on to do so. We have also identified what our legitimate interests are where appropriate.

Note that we may process your personal data for more than one lawful ground depending on the specific purpose for which we are using your data. Please contact us if you need details about the specific legal ground we are relying on to process your personal data where more than one ground has been set out in the table below.

Purpose/Activity	Type of data	Lawful basis for processing including basis of legitimate interest
If you are our actual or prospective client (or a transaction counterparty or a litigant in proceedings involving our actual or prospective client), to check whether we would have a conflict of interest in acting for such client.	a. Identity b. Contact c. Financial d. Professional Information e. Special Categories of Personal Data	a. Performance of a contract b. Necessary to comply with a legal obligation c. Necessary for our legitimate interests: to ensure we (and all parties concerned) understand any conflict of interest which might arise in respect of a matter
To accept you as a new client or to open a new matter for you, including performing anti-money laundering, sanction screening, source of funds, fraud and other background checks	a. Identity b. Contact c. Financial d. Professional Information e. Special Categories of Personal Data	a. Performance of a contract b. Necessary to comply with a legal obligation c. Legitimate interests: ensuring we do not deal with proceeds of criminal activities or assist in any other unlawful or fraudulent activities
If you are a transaction counterparty or a litigant in proceedings involving our actual or prospective client, to perform anti-money laundering, sanction screening, fraud and other background checks	a. Identity b. Contact c. Financial d. Professional Information e. Special Categories of Personal Data	a. Performance of a contract b. Necessary to comply with a legal obligation c. Legitimate interests: ensuring we do not deal with proceeds of criminal activities or assist in any other unlawful or fraudulent activities

Purpose/Activity	Type of data	Lawful basis for processing including basis of legitimate interest
To deliver client services and visitor services to you, including (among others) relevant technology solutions and conference facilities	a. Identity b. Contact c. Financial d. Professional Information e. Special categories of Personal Data f. Technical g. Usage h. Marketing & Communications	a. Performance of a contract b. Necessary to comply with a legal obligation c. Legitimate interests: ensuring that you are provided with high-quality client services and visitor services, and securing a prompt payment of any fees, costs and debts in respect of our services
To manage fees, charges and payment and to collect and recover amounts owed to us	a. Identity b. Contact c. Financial d. Professional Information	a. Performance of a contract b. Legitimate interests: ensuring that you are provided with high-quality client services and visitor services, and securing a prompt payment of any fees, costs and debts in respect of our services
To manage our relationship with you which will include: a. Notifying you about changes to our terms or privacy policy b. Asking you to leave feedback or take a client care survey	a. Identity b. Contact c. Marketing and Communications d. Profile e. Professional Information	a. Performance of a contract b. Necessary to comply with a legal obligation c. Necessary for our legitimate interests: to keep our records updated, ensure you have the most current terms and to understand how client use and perceive our services and to assist us in identifying ways to improve and grow our business.
To engage with regulatory, governmental or accreditation bodies (and similar authorities) in relation to you	a. Identity b. Contract c. Financial d. Professional Information	a. Performance of a contract b. Necessary to comply with a legal obligation c. Necessary for our legitimate interests: ensuring that you are provided with high-quality client services and to assist us in identifying ways to improve and grow our business.

Purpose/Activity	Type of data	Lawful basis for processing including basis of legitimate interest
To administer and protect our business and this website (including troubleshooting, data analysis, testing, system maintenance, support, reporting and hosting of data, managing our offices and facilities)	a. Identity b. Contact c. Technical d. Usage	a. Necessary for our legitimate interests: for running our business, provision of administration and IT services, network security, to prevent fraud and in the context of a business reorganisation or group restructuring exercise b. Necessary to comply with a legal obligation
To deliver relevant website content to you and measure or understand the effectiveness of the content we serve to you	a. Identity b. Contact c. Profile d. Usage e. Marketing and Communications f. Technical	Necessary for our legitimate interests: to study how customers use our website and services, to develop them, to grow our business and to inform our marketing strategy
To use data analytics to improve our website, services, marketing, customer relationships and experiences	a. Technical b. Usage	Necessary for our legitimate interests: to define types of users of our website and services, to keep our website updated and relevant, to develop our business and to inform our marketing strategy
To administer and protect our business and this website (including troubleshooting, data analysis, testing, system maintenance, support, reporting and hosting of data, managing our offices and facilities)	a. Identity b. Contact c. Technical d. Usage	a. Necessary for our legitimate interests: for running our business, provision of administration and IT services, network security, to prevent fraud and in the context of a business reorganisation or group restructuring exercise b. Necessary to comply with a legal obligation
To make suggestions and recommendations to you about services that may be of interest to you	a. Identity b. Contact c. Technical d. Usage e. Profile f. Marketing and Communications	Necessary for our legitimate interests: to develop our products/ services and grow our business

Marketing

We strive to provide you with choices regarding certain personal data uses, particularly around marketing and advertising.

You will receive marketing communications from us if you have consented to receive marketing communications or if you have requested information from us or obtained services from us and you have not opted out of receiving that marketing.

Third-party marketing

We will get your express opt-in consent before we share your personal data with any company outside of Gardner Leader for marketing purposes.

Opting out

You can ask us or third parties to stop sending you marketing messages at any time by following the opt-out links on any marketing message sent to you or by contacting us at any time.

Cookies

You can set your browser to refuse all or some browser cookies, or to alert you when websites set or access cookies. If you disable or refuse cookies, please note that some parts of this website may become inaccessible or not function properly. For more information about the cookies we use, please see our cookies policy.

Change of purpose

We will only use your personal data for the purposes for which we collected it, unless we reasonably consider that we need to use it for another reason and that reason is compatible with the original purpose. If you wish to get an explanation as to how the processing for the new purpose is compatible with the original purpose, please contact us.

If we need to use your personal data for an unrelated purpose, we will notify you and we will explain the legal basis which allows us to do so.

Please note that we may process your personal data without your knowledge or consent, in compliance with the above rules, where this is required or permitted by law.

5. Processing your personal data if you are not our client

There may be circumstances where you are not our client but we need to process your personal data in order to provide client services to our client (including when providing legal advice). In this case, your personal data may be used in legal proceedings on behalf of our client. We will process such personal data on the basis that:

- it is in our legitimate interests, our client's legitimate interests or those of another third party, to do so; and/or
- it is required in order to comply with our legal or regulatory obligations.

If you have any queries about how we process personal data in these circumstances, please contact us.

6. Processing your personal data for recruitment activities

If your personal data is collected or passed to us for recruitment activities, we will only use this personal data in order to contact you about recruitment and other opportunities you may have requested or expressed an interest in. If you apply for any role within Gardner Leader then your personal data will be processed in accordance with our privacy notice for job applicants which can be obtained by contacting us.

7. Disclosures of your personal data

We may have to share your personal data with the parties set out below for the purposes set out in the table in paragraph 4 above.

- External Third Parties as set out in the Glossary.
- Third parties to whom we may choose to sell, transfer, or merge parts of our business or our assets. Alternatively, we may seek to acquire other businesses or merge with them. If a change happens to our business, then the new owners may use your personal data in the same way as set out in this privacy notice.

We require all third parties to respect the security of your personal data and to treat it in accordance with the law. We do not allow our third-party service providers to use your personal data for their own purposes and only permit them to process your personal data for specified purposes and in accordance with our instructions.

8. International transfers

We do not transfer your personal data outside the European Economic Area (EEA).

9. Data security

We have put in place appropriate security measures to prevent your personal data from being accidentally lost, used or accessed in an unauthorised way, altered or disclosed. In addition, we limit access to your personal data to those employees, agents, contractors and other third parties who have a business need to know. They will only process your personal data on our instructions and they are subject to a duty of confidentiality.

We have put in place procedures to deal with any suspected personal data breach and will notify you and any applicable regulator of a breach where we are legally required to do so.

10. Data retention

How long will you use my personal data for?

We will only retain your personal data for as long as necessary to fulfil the purposes we collected it for, including for the purposes of satisfying any legal, regulatory, accounting, or reporting requirements.

To determine the appropriate retention period for personal data, we consider the amount, nature, and sensitivity of the personal data, the potential risk of harm from unauthorised use or disclosure of your personal data, the purposes for which we process your personal data and whether we can achieve those purposes through other means, and the applicable legal requirements.

We retain personal information we collect from you where we have an ongoing legitimate business need to do so (for example, to provide you with a service you have requested or to comply with applicable legal, tax or accounting requirements).

When we have no ongoing legitimate business need to process your personal information, we will either delete or anonymise it or, if this is not possible (for example, because your personal information has been stored in backup archives), then we will securely store your personal information and isolate it from any further processing until deletion is possible.

In some circumstances we may anonymise your personal data (so that it can no longer be associated with you) for research or statistical purposes in which case we may use this information indefinitely without further notice to you.

11. Your legal rights

Under certain circumstances, you have rights under data protection laws in relation to your personal data.

- **Request access** to your personal data (commonly known as a “data subject access request”). This enables you to receive a copy of the personal data we hold about you and to check that we are lawfully processing it.
- **Request correction** of the personal data that we hold about you. This enables you to have any incomplete or inaccurate data we hold about you corrected, though we may need to verify the accuracy of the new data you provide to us.
- **Request erasure** of your personal data. This enables you to ask us to delete or remove personal data where there is no good reason for us continuing to process it. You also have the right to ask us to delete or remove your personal data where you have successfully exercised your right to object to processing (see below), where we may have processed your information unlawfully or where we are required to erase your personal data to comply with local law. Note, however, that we may not always be able to comply with your request of erasure for specific legal reasons which will be notified to you, if applicable, at the time of your request.
- **Object to processing** of your personal data where we are relying on a legitimate interest (or those of a third party) and there is something about your particular situation which makes you want to object to processing on this ground as you feel it impacts on your fundamental rights and freedoms. You also have the right to object where we are processing your personal data for direct marketing purposes. In some cases, we may demonstrate that we have compelling legitimate grounds to process your information which override your rights and freedoms.
- **Request restriction** of processing of your personal data. This enables you to ask us to suspend the processing of your personal data in the following scenarios: (a) if you want us to establish the data’s accuracy; (b) where our use of the data is unlawful but you do not want us to erase it; (c) where you need us to hold the data even if we no longer require it as you need it to establish, exercise or defend legal claims; or (d) you have objected to our use of your data but we need to verify whether we have overriding legitimate grounds to use it.
- **Request the transfer** of your personal data to you or to a third party. We will provide to you, or a third party you have chosen, your personal data in a structured, commonly used, machine-readable format. Note that this right only applies to automated information which you initially provided consent for us to use or where we used the information to perform a contract with you.
- **Withdraw consent** at any time where we are relying on consent to process your personal data. However, this will not affect the lawfulness of any processing carried out before you withdraw your consent. If you withdraw your consent, we may not be able to provide certain products or services to you. We will advise you if this is the case at the time you withdraw your consent.

If you wish to exercise any of the rights on the previous page, please contact us.

No fee usually required

You will not have to pay a fee to access your personal data (or to exercise any of the other rights). However, we may charge a reasonable fee if your request is clearly unfounded, repetitive or excessive. Alternatively, we may refuse to comply with your request in these circumstances.

What we may need from you

We may need to request specific information from you to help us confirm your identity and ensure your right to access your personal data (or to exercise any of your other rights). This is a security measure to ensure that personal data is not disclosed to any person who has no right to receive it. We may also contact you to ask you for further information in relation to your request to speed up our response.

Time limit to respond

We try to respond to all legitimate requests within one month. Occasionally it may take us longer than a month if your request is particularly complex or you have made a number of requests. In this case, we will notify you and keep you updated.

12. Glossary

LAWFUL BASIS

Legitimate Interest means the interest of our business in conducting and managing our business to enable us to give you the best service/product and the best and most secure experience. We make sure we consider and balance any potential impact on you (both positive and negative) and your rights 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). You can obtain further information about how we assess our legitimate interests against any potential impact on you in respect of specific activities by contacting us.

Performance of Contract means processing your data where it is necessary for the performance of a contract to which you are a party or to take steps at your request before entering into such a contract.

Comply with a legal or regulatory obligation means processing your personal data where it is necessary for compliance with a legal or regulatory obligation that we are subject to.

THIRD PARTIES

External Third Parties

Where required, we will (subject to our professional obligations and any terms of business which we may enter into with you) disclose your personal data to:

- Service providers based in who provide IT and system administration services.
- Professional advisers including lawyers, bankers, accountants, auditors and insurers based who provide consultancy, legal, banking, accounting, audit and insurance services to us.

Any entity or person to whom we are requested or obliged to make such disclosure by any court of competent jurisdiction or by any governmental, law enforcement, regulatory, taxation or other authorities (for example, HM Revenue & Customs or the Solicitors Regulation Authority or the Law Society in the United Kingdom).



Gardner
Leader

Newbury Office

Maidenhead Office

Thatcham Office

Swindon Office

Windsor Office

London Office