



PRIVACY POLICY

Please read the following information carefully. This privacy notice contains information about what data we collect and store about you and why. It also tells you who we share this information with, the security mechanisms we have put in place to protect your data and how to contact us if you have a complaint.

Who we are?

Dexter Montague LLP collects, uses and is responsible for personal information about you. When we do this, we are the 'controller' of this information for the purposes of the UK General Data Protection Regulation (UK GDPR) and other applicable data protection laws.

Our contact details:

Name: William Montague

Address: 105 Oxford Road, Reading, RG1 7UD

Phone Number: 0118 393999

E-mail: bill.montague@dextermontague.co.uk

What do we do with your information?

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 information).

The types of information that we will collect from you will depend on what matter we are dealing with on your behalf (e.g. buying or selling a house, preparing a Will, administering an estate, dealing with financial issues arising from a divorce). However, there are several generic categories of information as follows;

- **Identity Data** – this includes your first name, maiden name, last name, username or similar identifier, marital status, title, date of birth and gender. It will also include information to enable us to check your identity e.g. you passport or driving licence details.
- **Contact data** - this includes your billing address, delivery address, email address and telephone numbers.

- **Marketing data** – this includes your preferences in receiving marketing from us and our third parties and your communication preferences.
- **Financial data** - this includes bank account and payment card details.

There is also other information which we will collect from you dependent on the nature of your instructions:

- Details of your spouse or partner, dependents and other family members;
- Your bank and/or building society details;
- In the event that we act for you in your divorce we will normally require to provide information and documentation in relation to the entirety of your finances (e.g. employment details, information in relation to all your investments, pensions, tax returns and assessments and any other relevant information). Similar information may be required where we act in the administration of an estate;
- Where we act for you in relation to an employment matter then employment information such as salary and benefits, employment records relating to sickness, performance and disciplinary records); we may also need to obtain information in relation to your racial or ethnic origin, gender and sexual orientation, religious or similar beliefs where we are instructed in discrimination cases;
- Nationality and immigration status;
- Medical records – e.g. where we act for you in Personal Injury claims or employment matters (and occasionally in divorce or family cases, deputyship matters and other litigation).

Data collected from other sources

We may collect the following information from other sources:

- Identity data, Contact data, Financial Data, Professional Information and Special Categories of Personal Data when we conduct anti-money laundering and other background checks;
- Analytics/Search information providers such as Google;
- Publicly available information such as public registers of companies, charities, law firms, chartered accountants or other professional bodies;
- Public registers for individuals such as electoral registers or registers of sanctioned persons and entities.

How we collect your personal data

We use different methods of collecting personal data. We can obtain the information from you through direct transactions (e.g. face to face or over the telephone or by email). You may also give us personal information by filling out forms or by corresponding with us. As outlined above some information may be obtained from third parties.

Whether data has to be provided by you, and why?

This personal information must be provided by you to us, to enable us to undertake the activities outlined below. In the event that we do not receive the information from you we may be unable to act for you.

How we use your personal data

We will only use your personal information when the law allows us to. The most common situations where this will apply are as follows;

- Where we need to perform the contract we are about to enter into or have entered into with you;
- Where it is necessary for your legitimate interests and your legitimate interests and rights do not override those interests. Legitimate interest means the interest of the business in conducting and managing our business to enable us to provide you with the best service and the best and most secure experience;
- Where we need to comply with a regulatory or legal obligation.

We use your personal information for the following purposes:

Purpose/Activity	Type of Data	Our Reasons
To take you on as a new client	(a) Identity (b) Contact	Performance of a contract with you
Instruction by you to provide legal services	(a) Identity (b) Contact (c) Financial (d) Other information outlined in this document (e) Marketing and communications	(a) Performance of a contract with you (b) For our legitimate interests (c) Necessary for the establishment, exercise or defence of legal claims
To perform other contractual obligations for you such as managing payments fees and charges and collecting and recovering monies owed to us	(a) Identity (b) Contact (c) Financial	(a) Performance of contract with you (b) Necessary for our legitimate interest
To comply with our regulatory requirements	(a) Identity (b) Contact (c) Financial	(a) Performance of contract with you (b) Necessary to comply with our legal obligations (c) Necessary for our legitimate interest

<p>To manage our relationship with you which will include;</p> <p>(a) Notifying you about changes to our terms or privacy policy</p> <p>(b) Asking you to leave a review or take a survey</p>	<p>(a) Identity</p> <p>(b) Contact</p> <p>(c) Marketing and Communications</p>	<p>(a) Performance of a contract with you</p> <p>(b) Necessary to comply with a legal obligation</p> <p>(c) Necessary for our legitimate interests</p>
<p>To make recommendations and suggestions to you about services that may be of interest to you</p>	<p>(a) Identity</p> <p>(b) Contact</p> <p>(c) Other information outlined in this document</p>	<p>Necessary for our legitimate interests (to develop our products/services and grow our business</p>

Who will we share your personal data with?

Generally speaking we will not share your personal information without your consent.

We will share personal information with law enforcement agencies if required by applicable law.

Where will we store your personal data and how long for?

We have put in place appropriate security measures to prevent your personal information from being accidentally lost, used or accessed in an unauthorised way, altered or disclosed. Those processing your information will do so only in an authorised way and are subject to a duty of confidentiality.

How long will we retain your personal data for?

We will only retain your personal data for as long as necessary to fulfil the purposes we collected it for. We will, however, keep your personal data after we have finished advising or acting for you for one of the following reasons;

- So that we can respond to any questions, complaints or claims made by you on your behalf. This will depend on the type of work we undertake for you and we will write to you at the conclusion of your matter to let you know how long we will be keeping the data;
- To keep records required by law and regulatory requirements.

When it is no longer necessary to retain your personal data, we will delete or anonymise it.

Consent

We do not generally rely on your consent as a legal basis for processing your personal data save in relation to sending you marketing materials and communications.

You have the right to withdraw this consent at any time, but this will not affect the lawfulness of any processing activity we have carried out prior to you withdrawing your consent. You can opt-out by using the contact details previously provided.

Your data protection rights

Under the UK GDPR, you have a number of important rights that you can exercise free of charge. In summary, these rights are:

- **Access** to your personal information and other supplementary information;
- **Rectification** - require us to correct any mistakes or complete missing information we hold on you;
- **Erasure** - require us to erase your personal information in certain circumstances;
- Receive a copy of the personal information you have provided to us or have this information be sent to a third party, this will be provided to you or the third party in a structured, commonly used and machine readable format;
- **Object** at any time to processing of your personal information for direct marketing;
- **Object** in certain other situations to the continued processing of your personal information;
- **Restriction** - Restrict our processing of your personal information in certain circumstances;
- **Data portability** – ask that we transfer the information you gave us to another organisation, or to you, in certain circumstances.
- Request not to be subject to automated decision making which produce legal effects that concern you or affect you in a significantly similar way.

If you want more information about your rights under the UK GDPR, please see the Guidance from the Information Commissioners Office on [Individual's rights under the UK GDPR](#).

If you want to exercise any of these rights, please contact William Montague using the contact details previously provided.

How to make a complaint

The UK GDPR also gives you the right to lodge a complaint with the Information Commissioner's Office. Their contact details are:

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

Helpline number: 0303 123 1113

Future processing

We do not intend to process your personal information for any reason other than stated within this privacy notice.

Changes to this privacy notice

This privacy was last updated on 27 April 2023.

We constantly review our internal privacy practices and may change this policy from time to time. When we do, we will update the policy on our website. In the event that we introduce any fundamental changes which affect how we handle your personal data, we will inform you by email or post.

Get in touch

If you have any questions about this privacy notice or the information we hold about you, please contact William Montague using the contact details provided earlier.