

# BOND & SHERWILL

EST. 1908

## Privacy Policy

**Effective Date:** 29 May 2025

### 1. Introduction

Bond & Sherwill Ltd ("we," "us," or "our") is dedicated to protecting and respecting your privacy. This Privacy Notice details how we collect, use, store, and share your personal data in accordance with the UK General Data Protection Regulation (UK GDPR) and the Data Protection Act 2018.

### 2. Data Controller

**Bond & Sherwill Ltd. We collect personal data to deliver our services effectively and in accordance with applicable legal requirements.**

134 Brighton Road, Coulsdon, Surrey CR5 2ND

Email: [privacy@bondandsherwill.co.uk](mailto:privacy@bondandsherwill.co.uk)

Phone: 0208 660 0189

### 3. Information We Collect

We collect personal data to provide our services effectively and in line with legal requirements. The types of personal data we may collect include:

- **Personal Identification Information:** First name, surname, date of birth, nationality, National Insurance number, previous names.
- **Contact Information:** Address, email, and telephone numbers.
- **Financial Information:** bank statements, credit card statements, mortgage statements, payslips, and self-employed accounts.
- **Employment Details:** Previous employer's information, employer's address and contact number, and accountant details.
- **Property Information:** Current and previous addresses, landlord details, new property details, solicitor details, estate agent details.
- **Identification Documents:** Primary and secondary ID documents for anti-money laundering (AML) compliance.
- **Other Information:** Health information, ethnicity, marital status, dependants' details.

### 4. How We Collect Your Data

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We gather personal information via the following channels:

- Directly from you through forms, emails, phone calls, or in-person meetings.
- From third parties, including credit reference agencies, financial institutions, law firms, referencing services, and government bodies.
- Through our website and digital platforms, utilising cookies and similar technologies.

## **5. Purposes for Processing Your Data**

We process your personal data for the following purposes:

- To offer property-related services, including sales, lettings, valuations, and property management.
- To organise viewings, valuations, and tenant referencing (where applicable).
- To handle payments and transactions, including billing, auditing, and reconciliation.
- To meet legal requirements, including anti-money laundering (AML) and identity verification checks.
- To communicate with you regarding our services, updates, and relevant property information.
- To send marketing communications, newsletters, and promotions with your consent or where we have a legitimate interest.
- To enhance our services and customer experience.
- To handle enquiries, complaints, and disputes.

## **6. Legal Basis for Processing**

Under the UK GDPR, we depend on the following legal bases for processing your personal data:

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- **Consent:** When you have given explicit permission for particular uses, such as marketing communications.
- **Contractual Necessity:** When processing is essential to perform a contract or to take steps at your request prior to entering into a contract.
- **Legal Obligation:** Where processing is necessary to comply with legal and regulatory requirements, such as AML regulations.
- **Legitimate Interests:** When processing is essential for our legitimate business interests (such as enhancing customer experience or promoting our services), as long as your rights do not override those interests.

## 7. Sharing Your Data

We do not sell your personal data. However, we may share it with trusted third parties, including:

- Service providers assisting in delivering our services (e.g., IT support, website hosting, communication tools).
- Tenant referencing agencies, financial institutions, solicitors, and insurers (where relevant).
- Regulatory bodies such as the Financial Conduct Authority (FCA), HM Revenue & Customs (HMRC), and credit reference agencies.
- Legal or law enforcement authorities when required to comply with legal obligations or to protect our legal rights.

All third parties are legally obliged to manage your data securely and in accordance with data protection legislation.

## 8. Data Retention

We keep personal data only as long as necessary to achieve the purposes outlined in this Privacy Policy or as required by law. Usually, this means we retain your data for up to seven years after our last interaction, in accordance with AML and professional duties.

## **9. Your Rights**

Under the UK GDPR, you possess the following rights:

- **Right of Access:** To request a copy of the personal data we hold about you.
- **Right to Rectification:** To request the correction of inaccurate or incomplete data.
- **Right to Erasure:** To request the deletion of your data, where applicable.
- **Right to Restrict Processing:** To request a restriction on the use of your data.
- **Right to Data Portability:** To request transfer of your data to another organisation.
- **Right to Object:** To oppose processing based on legitimate interests or direct marketing.
- **Right to Withdraw Consent:** When we rely on your consent, you may withdraw it at any time, either by using the unsubscribe link in emails or by contacting us directly.

To exercise any of your rights, please get in touch with us using the details in Section 2.

## **10. International Transfers**

We do not currently transfer your data outside the United Kingdom. If this changes in the future, we will ensure that sufficient safeguards are implemented, such as Standard Contractual Clauses or adequacy decisions, to protect your data in accordance with the UK GDPR.

## **11. Security Measures**

We implement suitable technical and organisational measures to protect your data from unauthorised access, loss, misuse, or modification. These include encryption, secure servers, role-based access controls, and regular security assessments.

## **12. Cookies and Tracking Technologies**

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We use cookies and similar technologies on our website to enhance your user experience and understand how the site is used. Some cookies are vital for the website's function, while others require your consent.

For further information, including how to set your preferences, please consult our separate Cookie Policy.

## **13. Changes to This Privacy Policy**

We may update this Privacy Policy occasionally to reflect changes in our practices, legal obligations, or service offerings. We recommend you check this page regularly. The latest version will always show the most recent effective date at the top.

## **14. Contact Us**

If you have any questions, concerns, or requests related to this Privacy Policy or your personal data, please get in touch:

**Data Protection Officer:** Mr. Harding

Bond & Sherwill Ltd

134 Brighton Road, Coulsdon, Surrey CR5 2ND

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Phone: 0208 660 0189