



JONES POTTS TAYLOR

Jones Potts Taylor Limited (JPT)

GDPR & Privacy Policy – MAR2023 1.0

PRIVACY NOTICE

1. Who we are;

This Privacy Notice applies to the use and processing of personal information collected by JonesPottsTaylor Limited and its associated Companies. The ICO Registration number for JonesPottsTaylor Limited is: ZB537447

The phrases “us”, “we” or “our” will mean those businesses which are part of JPT, on behalf of and in respect of whom this Privacy Notice is made. For information concerning the collection, use and processing of personal information by any of our third-party business partners or suppliers, please contact JPT, Lowton Business Park, 77 Newton Road, Lowton WA3 2AP, 01942 368 600, hello@jonespottstaylor.co.uk.

2. Information covered by this Privacy Notice;

Personal data - This is information, or any combination of separate pieces of information, that could be used to identify the client. Special categories of personal data -This is information that is classified as sensitive (for example details of the client's health).

3. Where we get personal information;

When a client enquires or registers for a product or service provided by JPT, we may collect personal information from a variety of sources, including;

- Information we collect directly, either through face-to-face contact, by telephone, email or electronic communications such as messaging or through the internet.
- Information we collect when an account is created on our website/portals
- Information provided to us by third parties
- Information from publicly available sources, for example, Land Registry

4. What information we collect

4.1 Information we collect directly;

Depending on the type of service or product we are discussing, the following are examples of information we may collect directly;

- Name
- Date of birth
- Email address
- Postal address
- Telephone number
- Family Information
- Health Information
- Financial information, such as earnings and outgoings
- Payment information, such as a credit card and bank account details
- Communication and marketing preferences
- We may, during the course of the relationship, request additional information that is relevant to the provision of specific services.

Any telephone calls either to or from our customer service teams may be recorded for training, monitoring, compliance and security.

4.2 Information collected from our web sites

We use cookies and other technologies to collect information when our websites/portals are visited. Details of how we use cookies are provided in Section 13 'Our Use of Cookies'.

4.3 Information we obtain from third parties

Where we are required by law, or for business needs, we will obtain information from third parties, but only after we have an agreement to do so. For example (but not limited to) the third parties we may need to contact are credit reference agencies, banks, employers, accountants and solicitors in order to obtain references, undertake identity verification and basic criminal record checks, and validate your income level and financial history.

5. Who we share your information with;

We may share your information both within the JPT Estate Agency and companies and also relevant third-party business partners.

Where we engage third party service providers to provide products (such as mortgages, house and contents and family protection insurances and utility providers) or other business services and operations, we provide them with only the personal information they need to perform the service we request. We contractually require them to securely protect information, and not to use it for any other purpose.

We also provide a link from our website to Google Maps, to show the location of a branch or a property, and to provide direction information. Using Google Maps binds the client by the Google Maps/Google Earth Additional Terms of Service https://maps.google.com/help/terms_maps.html including the Google Privacy Policy <https://www.google.com/intl/ALL/policies/privacy/index.html>.

6. How we use information;

We will process the information provided or obtained from other sources to provide products, services and answer any questions.

The following are examples of how we may use the information we collect;

- To process registration and confirm identity
- To provide a full range of estate agency services for the sale and purchase of property
- To provide a full lettings service for tenants, prospective tenants and landlords
- To provide property management services
- To arrange mortgages
- To arrange protection insurances
- To provide conveyancing services
- To process payment for our services
- To protect against and prevent fraud, unauthorised transactions, money laundering, tax evasion, claims, other liabilities and manage risk exposure and agent or franchise quality, integrity, compliance and security of business processes
- To provide, administer and communicate about JPT products, services, offers, programs and promotions, their issuers, acquirers, retailers and partners
- To operate, monitor, evaluate and improve our products, services and website

6.1 Customer Surveys

From time to time, we may provide information to customer service agencies for research, survey and analysis purposes so that we can monitor and improve the services we provide. We and our sub-contractors may occasionally make contact by post, email or telephone to ask for feedback and comments on our services.

6.2 Information about our products and services

We may also use personal data to make contact by post, e-mail, telephone or other electronic means to provide information about products and services from JPT and carefully selected third parties which we feel may be of interest or relevant.

6.3 Credit scoring

Some of the services provided by third parties may involve an automated decision and/or credit scoring to determine whether we are able to provide a service or product.

Using third parties to undertake searches and collate information on our behalf helps make fair and responsible decisions. When coming to these decisions we and third parties will consider;

- The information provided on the application form
- Information about previous account conduct, including any payment arrears and
- Official public records information such as fraud record information and insolvency records
- Any credit scoring methods used by third parties are regularly tested to ensure they remain fair, effective and unbiased.

For further information about automated decisions or credit scoring, please contact JPT, Lowton Business Park, 77 Newton Road, Lowton WA3 2AP, 01942 368 600, hello@jonespottstaylor.co.uk

7. Lawful basis of processing

JPT processes information under any of the following lawful conditions;

Performance of a contract - This is where the collection and processing of data is necessary for the performance of a contract, or in order to take steps prior to entering into a contract.

Legal obligation - This is where the collection and processing of data is necessary for compliance with a legal obligation, for example verification of identity and fraud prevention.

Consent - Where we process information under consent, we will seek clear and unambiguous consent before processing data, for example to receive marketing information from other JPT companies.

Legitimate interests - Some information is processed by JPT companies as part of its legitimate interests which include network and information security, opting out of communications, direct marketing, web analytics, updating customer details, lettings, sales, and other core services provided

8. Other situations

We may transfer or otherwise process your personal information:

- As part of the sale of a JPT company business to another company
- When we have received your instruction to pass the sale of your property to another agent
- To enforce our terms and conditions
- When required by law and/or government authorities
- When requested by the *Property Redress Scheme* or any other consumer ombudsman or trade association.

9. How long we keep information

We will keep information for as long as is reasonably necessary for the purposes set out in this privacy notice, and to fulfil our legal and regulatory obligations.

10. When we will communicate

We will send all service-related communications.

We may also make contact in order to provide information about our products and services which we believe may be of interest.

11. How we communicate

For service-related communications, we will make contact either by e-mail or through the post. We may also use telephone or SMS messages, which may include automated SMS reminders for viewings.

We will enquire about how we communicate promotions and offers.

11.1 By email

We will send promotional emails.

To stop receiving promotional email messages from JPT respond and request to opt out or by contacting and speaking with a representative.

11.2 By post

We will send promotional letters by post.

To stop receiving promotional letters from JPT request to opt out or by contacting and speaking with a representative.

11.3 Telephone

We will make contact by telephone for promotional reasons.

To stop receiving promotional telephone calls from JPT request to opt out or by contacting and speaking with a representative.

12. Statutory rights;

A number of rights concerning the personal information we use include the right to;

- Ask us for access to a copy of your personal information we hold
- Ask us to correct personal information
- Withdraw consent to use personal information

To stop receiving information from JPT or carefully selected third parties you can opt out by contacting JPT directly. We will act to respond to this request to stop receiving promotional content from JPT as quickly as is practicable (around 3 working days). We will keep information for record keeping purposes but ensure we fulfil any requests not to send particular types of messages. You may withdraw that consent at any time. If you withdraw your consent, we will only use data in relation to our service we are still contracted to provide. Regarding this, requests can be made like:

- Ask us to restrict the use of personal data, including direct marketing
- Object to our use of personal data
- Object to an automated decision, including profiling (for example, in terms of credit risk)
- Lodge a complaint with the Information Commissioner's Office, to object to the way we use personal information.

For more information, please go to www.ico.org.uk

To make a request for access to a copy of your personal data, please write to us. We will acknowledge the request and we will respond with what we will need to carry out the request. Every effort will be made to respond to or comply with the request as quickly as possible, and we will ensure our systems are updated as soon as is practicable in response to the request.

13. Our use of cookies

A cookie is a small file placed on a device when a website has been visited that can be understood by the site that issued the cookie. We use the information collected by cookies to remember the visitor to enable log in and to store preferences settings when using a particular site. It may contain a unique identifier to ensure that the same information is not being shown and that the only information shown is relevant.

Agreeing to let cookies be saved in order to use the site will allow navigation of the Site.

The following are examples of information we may collect:

- Information about a device browser and operating system
- Internet protocol (IP) address assigned to your internet service
- The web pages visited on our websites
- Any embedded links viewed

13.1 Third party cookies used on the site

We use Google Analytics to provide us with information about the visit to our website. We do this in order to help improve our website service to customers.

Their cookies typically store anonymous aggregated information such as whether a visitor has been to the site before, and the time of the current visit.

We or our third-party advertisers may also use cookies to monitor the effectiveness of advertising on the site.

13.2 Other Technologies

Our security software may use your IP address and browser version to help protect our systems and provide diagnostic information in the case of an issue.

14. How we protect information

We store personal information on our computer systems and in our paper records. We have implemented strict security procedures to ensure that personal information is not damaged, destroyed or misused, and to prevent unauthorised access to information.

The information that we collect is stored in a secure facility with restricted physical access. We also use a number of security measures to prevent electronic access. Where -in line with this Privacy Notice - information is shared with third parties, similar security measures are used to protect information.

15. Data Transfers

We ourselves do not currently transfer the personal information we collect to recipients in countries other than the country in which the information originally was collected. Those countries may not have the same data protection laws as the country in which initially provided the information. If in the future we or our partners need to transfer information to recipients in other countries we will:

- Perform those transfers in accordance with the requirements of applicable law and subject to appropriate safeguards, and
- Protect the transferred personal information in accordance with this Privacy Notice

16. Children's privacy

We do not offer any products or services to children. In certain circumstances (for example a mortgage application) we may need to collect the name and date of birth of children from mortgage applicants, and share this with the selected mortgage provider.

17. Links to other websites

Our websites, other electronic portals and documentation may provide links to other websites for convenience and information. These may operate independently from us and have their own privacy notices or policies.

Where linked websites are not owned or controlled by us, we are not responsible for their content or data privacy practices.

18. Our Promise to you

When information is provided to us, the collection, use and sharing of information in accordance with this data privacy notice is agreeable. Our promise to you is that;

- We'll work with other businesses to put together offers which are of relevance
- Controlling of data easily
- Changes can be made at any time
- Data is secured
- We also promise to collect, process store and share data safely and securely and to make sure the businesses we work with do the same

19. Updates to our Privacy Notice

We will occasionally update our Privacy Notice, so we suggest that a review of this Notice is necessary from time to time. If we make substantial changes to our Privacy Notice, we will endeavour to inform you directly about these changes.

Please read this Privacy Notice carefully. Any questions about this notice or our use of personal data, please contact JPT, Lowton Business Park, 77 Newton Road, Lowton WA3 2AP, 01942 368 600, hello@jonespottstaylor.co.uk.