

Privacy Notice

Addo Equity Limited values your privacy and cares about the way in which your personal information is treated.

1. What personal information do we collect about you?

We may collect personal information from you in the course of our business, when you contact or request information from us, or when you engage our services.

The personal information that we process includes:

- Basic information, such as your name (including name prefix or title), the company you work for, your title or position and your relationship to a person
- Contact information, such as your postal address, email address and phone number(s)
- Financial information, such as payment-related information, bank statements, profit and loss details
- Technical information, such as information in relation to materials and communications we send to you electronically
- Information you provide to us for the purposes of attending meetings and events, including access and dietary requirements
- Identification and background information provided by you or collected
- Personal information provided to us by or on behalf of our clients or generated by us in the course or providing services to them, which may include special categories of data
- Any other information relating to you which you may provide to us

2. How we obtain your personal information

- We collect information from you as part of our business processes and about you and others as necessary in the course of our services
- We collect your personal information while monitoring our technology tools and services, including our email communications sent to and from Addo Equity Limited
- We gather information about you when you provide it to us, or interact with us directly, for instance engaging with our staff
- We may collect or receive information about you from other sources, such as keeping the contact details we already hold for you accurate and up to date using publically available sources

3. How we use your personal information

Addo Equity Limited collects and processes personal information about you in a number of ways, including through the provision of services by us. We use that information:

- To provide and improve our services to you and to our clients, including handling the personal information of others on behalf of our clients

- To provide information requested by you
- To promote our services, including sending updates, publications and details of events
- To manage and administer our relationship with you and our clients
- To fulfil our legal, regulatory and risk management obligations
- For the purposes of recruitment

3.1 Marketing and other emails

We use personal information to understand whether you read the emails and other materials, such as publications, offers and services which we send to you. We do this by using software that places a cookie on your device which tracks this activity and records it against your email address.

If you receive marketing communications from us and no longer wish to do so, you may unsubscribe at any time by contacting us at info@addoequity.co.uk.

3.3 Meetings, events and seminars

We will collect and process personal information about you in relation to your attendance at our offices or at an event or seminar organised by Addo Equity Limited or its business partners. We will only process and use special categories of personal information about your dietary or access requirements in order to cater for your needs and to meet any other legal or regulatory obligations we may have. We may share your information with IT and other service providers or business partners involved in organising or hosting the relevant event.

3.4 Property and other services

We collect, create, hold and use personal information in the course of and in connection with the services we provide to our clients. We may process identification and background information as part of our business acceptance, finance, administration and marketing processes. We will also process personal information provided to us by or on behalf of our clients for the purposes of the work we do for them. The information may be disclosed to third parties such as banks, accountants and auditors to the extent reasonably necessary in connection with that work, or as legally required by law.

4. On what basis we use your personal information

We use your personal information on the following bases:

- To perform a contract as per our lease, maintenance and service agreements, such as engaging with an individual to provide property or other services
- To comply with legal and regulatory obligations
- To send you marketing materials relevant to the services which we have provided to you, subject to your consent.
- For legitimate business purposes.

5. Where we store your personal information and how long we keep it for

We store your personal information locally and may from time to time, as any necessary, keep backups in cloud servers within EU in a GDPR compliant manner.

Your personal information will be retained in accordance with our data retention policy which categorises all of the information held by Addo Equity Limited and specifies the appropriate retention period for each category of data, with the norm being 6 years. Those periods are based on the requirements of applicable data protection laws and the purpose for which the information is collected and used, taking into account legal and regulatory requirements to retain the information for a minimum period, limitation periods for taking legal action, good practice and Addo Equity Limited business purposes.

6. Who we share your personal information with

Any information that you provide to us may be shared with and processed by the team at Addo Equity Limited. We may also share your personal information with certain trusted third parties in accordance with contractual arrangements in place with them, including:

- Our professional advisers and auditors
- Mortgage companies
- Banks
- Our marketing consultants
- Her Majesty's Land Registry
- Suppliers to whom we outsource certain support services
- IT service providers to Addo Equity Limited
- Third parties engaged in the course of the services we provide to clients and with their prior consent
- Third parties involved in hosting or organising events or seminars

Where necessary, or for the reasons set out in this policy, personal information may also be shared with regulatory authorities, courts, tribunals, government agencies and law enforcement agencies. While it is unlikely, we may be required to disclose your information to comply with legal or regulatory requirements. We will use reasonable endeavours to notify you before we do this, unless we are legally restricted from doing so.

If in the future we re-organise or transfer all or part of our business, we may need to transfer your information to new Addo Equity Limited entities or to third parties through which the business of Addo Equity Limited will be carried out.

Addo Equity Limited may use social media sites such as Facebook, LinkedIn and Twitter. If you use these services, you should review their privacy policy for more information on how they deal with your personal information.

We do not sell, rent or otherwise make personal information commercially available to any third party, except with your prior permission.

7. How we protect your personal information

We use a variety of technical and organisational measures to help protect your personal information from unauthorised access, use, disclosure, alteration or destruction consistent with applicable data protection laws.

8. Your rights regarding your personal information; Complaints; and Contact details

The European Union's General Data Protection Regulation and other applicable data protection laws provide certain rights for data subjects.

You are entitled to request details of the information we hold about you and how we process it. You may also have a right in accordance with applicable data protection law to have it rectified or deleted, to restrict our processing of that information, to stop unauthorised transfers of your personal information to a third party and, in some circumstances, to have personal information relating to you transferred to another organisation. You may also have the right to lodge a complaint in relation to Addo Equity Limited processing of your personal information with a local supervisory authority.

If you object to the processing of your personal information, or if you have provided your consent to processing and you later choose to withdraw it, we will respect that choice in accordance with our legal obligations.

Your objection (or withdrawal of any previously given consent) could mean that we are unable to perform the actions necessary to achieve the purposes set out above (see 'How we use your personal information') or that you may not be able to make use of the services and products offered by us. Please note that even after you have chosen to withdraw your consent we may be able to continue to process your personal information to the extent required or otherwise permitted by law, in particular in connection with exercising and defending our legal rights or meeting our legal and regulatory obligations.

We must ensure that your personal information is accurate and up to date. Therefore, please advise us of any changes to your information by emailing us at info@addoequity.co.uk.