

## **Introduction**

Welcome to the Dacre, Son & Hartley Limited (“DSH”) privacy notice.

DSH respects your privacy and is committed to protecting your personal data.

### **1. Important information and who we are**

As one of the longest established firms of property consultants in Yorkshire, with almost 200 years of history, DSH are here to provide solid advice, based upon sound local knowledge and professional levels of service.

Our dedicated teams are supported by market leading technology and have in-depth expertise to assist you through all aspects of your property transactions – be it buying, selling or entering in to a tenancy. What’s more our RICS surveyors and commercial property experts provide comprehensive specialist services across the North of England and beyond.

Productivity and a personal approach are key to us consistently delivering the right results – whatever your property needs.

#### **Purpose of this privacy notice**

This privacy notice aims to give you information on how DSH collects and processes your personal data, however you provide it to us.

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**

Dacre, Son & Hartley Limited is the controller and is responsible for your personal data (collectively referred to as "DSH", "we", "us" or "our" in this privacy notice).

We have appointed a data privacy manager 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 DSH data privacy manager using the details set out below.

Email address: [GDPR@dacres.co.uk](mailto:GDPR@dacres.co.uk)

Postal address: 1-5 The Grove, Ilkley, West Yorkshire LS29 9HS

We also operate the website at [www.dacres.co.uk](http://www.dacres.co.uk).

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](http://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**

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.

We reserve the right to make changes to this privacy notice at any time.

## **Our Franchisees**

DSH's operations in Elland and Morley are owned and operated by independent franchisees. Elland is owned and operated by Elland and Regional Estates Limited of 3 Victoria Road, Elland, HX5 0AB (contact James Philip Garnett on pg@dacres.co.uk and 01422 414888), and Morley is owned and operated by Right House Yorkshire Limited of 10 Cliff Parade, Wakefield WF1 2TA (contact Gavin Scott Townsend on gst@dacres.co.uk and 0113 322 6333) (together, our "Franchisees"). If you buy or sell or let a property with either of our Franchisees and provide personal data to them, they will share that personal data with us for the purposes set out in this privacy notice. If you buy or sell or let a property with DSH, we will share your personal data with our Franchisees so that your property search, or search for a buyer or tenant, receives the widest possible exposure throughout our network. Our Franchisees are independent controllers of any personal data you provide to them, however they will process your data in accordance with the terms of this privacy notice to the extent applicable (for example, marketing communications are dealt with by DSH and, if you have bought or sold or let a property with either of our Franchisees, are sent out by DSH on behalf of the Franchisees).

## **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).

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, last name, marital status, title, date of birth and gender.
- **Contact Data** includes home address, email address and telephone numbers.
- **Financial Data** includes bank account and payment card details, and details about payments to and from you.
- **Transaction Data** includes details of services you have purchased or otherwise received from us.
- **Technical Data** includes internet protocol (IP) address, your login data for our website, 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 our website.
- **Marketing and Profile Data** includes your preferences in receiving marketing from us and your communication preferences, your interests, feedback and survey responses.

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. 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.

We do not collect any **Special Categories of Personal Data** about you (this 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). Nor do we collect any information about criminal convictions and offences.

Please also note that we do not knowingly collect data relating to children.

### **If you fail to provide personal data**

Where we need to collect personal data by law, or under the terms of a contract we have with you or to provide you with services you have requested, and you fail to provide that data when requested, we may not be able to perform the contract we have or to provide you with the services you have requested from us. In this case, we may have to cancel the contract or service in question that you have with us but we will notify you if this is the case at the time.

### **3. How is your personal data collected?**

We use different methods to collect data from and about you including through:

- Direct interactions. You may give us your data by corresponding with us by post, phone, email or otherwise. This includes for example personal data you provide when you create an account on our website, subscribe, request or apply for any of our services (whether paid for or free) or publications, or request marketing materials to be sent to you.
- Third parties or publicly available sources. We may receive personal data about you from various third parties and public sources. This includes for example Technical Data from analytics providers such as Google.
- Contact, Financial and Transaction Data from providers of technical, payment and other services.
- 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, and other similar technologies.

### **4. How we use your personal data**

We will only use your personal data when the law allows us to. Most commonly, we will use your personal data in the following circumstances:

- Where we need to perform the contract we are about to enter into or have entered into with you.
- 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.
- Where we need to comply with a legal or regulatory obligation.

## 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.

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.

<b>Purpose/Activity</b>	<b>Type of data</b>	<b>Lawful basis for processing including basis of legitimate interest</b>
To process and deliver any services you have contracted with us to provide	(a) Identity (b) Contact (c) Financial (d) Transaction	(a) Performance of a contract with you (b) Necessary for our legitimate interests (in respect of recovering debts due to us)
To provide you with information, you have requested from us, respond to enquiries or requests from you, and communicate with you in relation to those enquiries or requests (for example, arranging visits to properties marketed by us)	(a) Identity (b) Contact (c) Marketing and Profile	(a) Necessary for our legitimate interests (carrying out activities in the course of DSH's business in response to customer enquiries or requests)
To manage our relationship with you (which will include notifying you about changes to our terms or privacy policy)	(a) Identity (b) Contact (c) Financial (d) Transaction (e) Marketing and Profile	(a) Performance of a contract with you (b) Necessary to comply with a legal obligation (c) Necessary for our legitimate interests (to keep our records updated and the administration and management of our business)
To enable you to give feedback or complete a survey	(a) Identity (b) Contact (c) Marketing and Profile	(a) Necessary for our legitimate interests (to study how customers use our products/services, to develop them and grow our business)
To administer and protect our business and our website (including troubleshooting, data analysis, testing, system maintenance, support, reporting and hosting of	(a) Identity (b) Contact (c) Technical (d) Financial (e) Transaction	(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)

data)		(b) Necessary to comply with a legal obligation
To comply with anti-money laundering requirements	(a) Identity (b) Contact	Necessary to comply with a legal obligation
To use data analytics to improve our website, products/services, marketing, customer relationships and experiences	(a) Technical (b) Marketing and Profile	Necessary for our legitimate interests (to define types of customers for our products and services, to keep our website updated and relevant, to develop our business and to inform our marketing strategy)
To send you marketing communications, if you have chosen to receive these.	(a) Identity (b) Contact (c) Technical (d) Marketing and Profile	Consent
To provide you with information regarding similar services to those you have already purchased.	(a) Identity (b) Contact (c) Transaction (d) Technical (e) Marketing and Profile	Necessary for our legitimate interests (to develop our products/services and grow our business, including that of our Franchisees, in particular through marketing)
To provide your data to a mortgage provider partner, for them to contact you about mortgages/mortgage finance advice.	(a) Identity (b) Contact (c) Transaction (d) Marketing and Profile	Necessary for our legitimate interests (to make available to our customers products/services that are very closely related to our own, so as to grow our business, and that of our mortgage provider partners, in particular through marketing)
To provide your data to professional service providers such as lawyers who you may need to assist you with the transaction we are acting on for you.	(a) Identity (b) Contact (c) Transaction (d) Marketing and Profile	Consent

## **Marketing**

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

### **Promotional offers from us**

We may use your Identity, Contact, Transaction, Technical, and Marketing and Profile Data to form a view on what we think you may want or need, or what may be of interest to you. This is how we decide which services and offers may be relevant for you.

You will receive marketing communications from us if you have consented to receiving such communications from us or you have purchased services from us and, in each case, you have not (or have not subsequently) opted out of receiving that marketing.

If you have purchased services from one of our Franchisees, you will receive marketing communications from us on behalf of those Franchisees, unless you have opted out of receiving that marketing.

### **Third-party marketing**

We may provide your Personal Data to a mortgage provider partner, for them to contact you about mortgages, unless you have asked us not to do so.

We may provide your Personal Data to professional service providers such as lawyers who you may need to assist you with the transaction we are acting on for you, if we feel this will be of benefit to you, and if you have consented to us passing your Personal Data to them.

### **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.

Where you opt out of receiving these marketing messages, this will not apply to personal data that we process and use on a different lawful basis, or in respect of which you continue to consent to us processing.

### **Our Website - Cookies**

Cookies are small text files that are placed on to your computer by websites that you visit. We use cookies on our website, which may collect personal data.

Cookies may be either "persistent" cookies or "session" cookies: a persistent cookie will be stored by a web browser and will remain valid until its set expiry date, unless deleted by the user before the expiry date; a session cookie, on the other hand, will expire at the end of the user session, when the web browser is closed.

You can set your web 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 our website may become inaccessible or not function properly.

We use the following cookies:

*Essential cookies.* These are cookies that are required for the operation of our website. They include, for example, cookies that enable you to log into secure areas of our website, and to use online forms.

*Analytical cookies.* These are persistent cookies that allow us to recognise and count the number of visitors and to see how visitors move around our website when they are using it. This helps us to improve the way our website works, for example, by ensuring that users are finding what they are looking for easily.

*Marketing cookies.* These are persistent cookies that are used to recognise you when you return to our website. This enables us to personalise our content for you, greet you by name and remember your preferences. These cookies also record your visit to our website, the pages you have visited and the links you have followed. We will use this information to make our website, the advertising displayed on it and communications sent more relevant to your interests.

Cookie ID	Type of cookie	Origin	Reason
_ctesius_session	Essential	Homeflow	Homeflow is the provider of our website software. This cookie is used to track logged in users, saved searches and saved properties.
cookie_directive	Essential	Homeflow	Used to hide the cookie policy notice if already seen.
__ga __gid __utmb __utmt __utmz	Analytical	Google Analytics	Google Analytics is a third-party website monitoring tool that allows users to see volumes of website visitors, their source, and to analyse how the content of their website is viewed and navigated. Google Analytics does not store any personal information about website visitors, but does use persistent cookies to identify repeat visitors. You may universally opt-out of all Google Analytics tracking used by all websites by visiting <a href="https://tools.google.com/dlpage/gaoptout">https://tools.google.com/dlpage/gaoptout</a>  Google's privacy policy is available at: <a href="https://www.google.com/policies/privacy/">https://www.google.com/policies/privacy/</a> .

### **Our 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.

### **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. 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.

- Franchisees of DSH.
- Service providers (acting as processors) who provide services to DSH, including Property Maintenance services; IT service providers; Credit reference agencies; Anti-Money Laundering (AML) service providers; Bailiffs and debt collection agencies; Document storage/management providers.
- Banks (acting as controllers) to whom Financial & Transaction Data may be disclosed for the purposes of payments and receipts in respect of our work.
- Other professional advisers (acting as controllers) including lawyers, surveyors, auditors and insurers who provide consultancy, legal, surveying, insurance and accounting services.
- Mortgage brokers (acting as controllers) who may provide you with advice (including but not limited to mortgage advice and mortgage brokering services).
- HM Revenue & Customs, regulators, Tenancy Deposit Schemes, and other authorities (acting as controllers) who may require reporting of processing activities in certain circumstances.
- Property Guarantors; Utility Companies; Independent experts/arbitrators; Joint Agents and Developers.
- 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.

In addition, we may disclose your personal data where such disclosure is necessary for compliance with a legal obligation to which we are subject, or for the establishment, exercise or defence of legal claims, whether in court proceedings or in an administrative out-of-court procedure.

## **6. International transfers**

We, or some of the service providers processing personal data for us, may transfer personal data outside the UK. This must only be done pursuant to a specific legal basis. Any such personal data transfer is usually based on one of the legal bases described below, however you can inquire with

us to learn more and in particular which legal basis applies to which specific service, through the contact details provided in this policy.

### **Data transfer based on standard contractual clauses**

If this is the legal basis, the transfer of Personal Data from the UK to other countries is carried out according to standard contractual clauses made or approved under the Data Protection Act 2018. This means that data recipients have committed to process personal data in compliance with the data protection standards set forth by UK data protection legislation.

### **Data transfer to countries that guarantee appropriate data protection standards**

If this is the legal basis, the transfer of personal data is carried out according to adequacy regulations made under the Data Protection Act 2018. These adequacy regulations are issued in respect of specific countries that provide personal data protection standards comparable to those in UK data protection legislation.

## **7. 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.

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.

## **8. Data retention**

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, accounting, or reporting requirements or specific statutory obligations.

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.

Retention periods may be set out in any relevant contract you hold with us. We often have to keep personal data for 7 years after your contract with us, for tax purposes. Otherwise, details of the relevant retention periods can be obtained by contacting our data privacy manager as described in paragraph 1 above. Please note however that in some cases it is not possible for us to specify in advance the periods for which we will retain your personal data.

In some circumstances you can ask us to delete your data: see below for further information.

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.

## **9. Your legal rights**

Under certain circumstances, you have rights under data protection laws in relation to your personal data. Please see below for further information. If you wish to exercise any of these rights, please contact our data privacy manager.

### **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.

## **10. 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. 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.

### **YOUR LEGAL RIGHTS**

You have the right to:

**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.

**April 2021**