

PRIVACY NOTICE PROVIDED BY HERITAGE MANAGEMENT LIMITED

This privacy notice explains what personal data (information) we hold about you, how we collect it, and how we use and may share information about you during our management of properties and after it ends. We are required to notify you of this information under the General Data Protection Regulation.

Please ensure you read this notice (sometimes referred to as a “privacy notice”) and any other similar notice we may provide to you from time to time when we collect or process personal information about you. This privacy notice contains important information on who we are, how and why we collect, store, use and share personal information, your rights in relation to your personal information and how to contact us and supervisory authorities in the event you have a complaint.

1. WHO WE ARE

Heritage Management Limited collects uses and is responsible for certain personal information about you. When we do so we are regulated under the [General Data Protection Regulation](#) which applies across the European Union (including in the United Kingdom) and we are responsible as ‘controller’ of that personal information for the purposes of those laws.

In this privacy notice, references to “we” or “us” means Heritage Management Limited.

2. DATA PROTECTION PRINCIPLES

We will comply with the data protection principles when gathering and using personal information, as set out in our GDPR data protection policy.

3. THE PERSONAL INFORMATION WE COLLECT, RECEIVE AND USE: INFORMATION COLLECTED BY US

In the course of managing properties we collect the following personal information when provided to us: Name, contact details, address, property address, telephone numbers, e-mail addresses, property details.

The provision of the personal information (as above) is required to enable us to perform our contract as managing agent appointed for and on behalf of each estate. We will inform you at the point of collecting information from you, whether you are required to provide the information to us.

4. THE PERSONAL INFORMATION WE COLLECT, RECEIVE AND USE: INFORMATION COLLECTED FROM OTHER SOURCES

We also obtain personal information from other sources as follows: Solicitors, Debt Collection, Accountants/Auditors, Contractors, Emergency out of hours contractors, Surveyors, Insurance Brokers/providers, RICS/ARMA, Fire brigade, Police, Local Authorities, Directors, Clients, Managing Agents, staff on site, Software providers, IT Support, Shredding firms, Couriers.

5. HOW WE USE YOUR PERSONAL INFORMATION

We will typically collect and use this information for the performance of a contract you have with our client and pursuant to which we are appointed as their agent. For the purposes of our legitimate interests or those of a third party, but only if these are not overridden by your interests, rights or freedoms. We seek to ensure that our information collection and processing is always proportionate. We will notify you of any material changes to information we collect or to the purposes for which we collect and process it.

6. WHO WE SHARE YOUR PERSONAL INFORMATION WITH

We routinely share names, addresses and telephone numbers. This personal information may be shared with the following categories of recipients: Solicitors, Debt Collection, Accountants/Auditors, Contractors, Emergency out of hours contractors, Surveyors, Insurance Brokers/providers, RICS/ARMA, Fire brigade, Police, Local Authorities, Directors, Clients, Managing Agents, staff on site, Software providers, IT Support, Shredding firms, Couriers. This data sharing enables us to perform our contract as managing agent.

We will share personal information with law enforcement or other authorities if required by applicable law. We will not share your personal information with any other third party.

7. WHERE YOUR PERSONAL INFORMATION MAY BE HELD

Information may be held at our offices and third-party agencies, service providers, representatives and agents as described above. We have security measures in place to seek to ensure that there is appropriate security for information we hold including those measures detailed in our GDPR data protection policy. Or, for example, a set number of years after a data subject ceases to be a lessee in that development.

8. HOW LONG YOUR PERSONAL INFORMATION WILL BE KEPT

We will hold your personal data (name, address and contact details) for a minimum of 6 years (*or the duration of a management contract).

9. REASONS WE COLLECT AND USE YOUR PERSONAL INFORMATION

We rely on contract as the lawful basis on which we collect and use your personal data.

10. YOUR RIGHTS

Under the [General Data Protection Regulation](#) you have a number of important rights free of charge. In summary, those include rights to:

- fair processing of information and transparency over how we use your use personal information
- access to your personal information and to certain other supplementary information that this Privacy Notice is already designed to address
- require us to correct any mistakes in your information which we hold
- require the erasure of personal information concerning you in certain situations
- receive the personal information concerning you which you have provided to us, in a structured, commonly used and machine-readable format and have the right to transmit those data to a third party in certain situations
- object at any time to processing of personal information concerning you for direct marketing
- object to decisions being taken by automated means which produce legal effects concerning you or similarly significantly affect you
- object in certain other situations to our continued processing of your personal information
- otherwise restrict our processing of your personal information in certain circumstances
- claim compensation for damages caused by our breach of any data protection laws

For further information on each of those rights, including the circumstances in which they apply, see the [Guidance from the UK Information Commissioner's Office \(ICO\) on individuals' rights under the General Data Protection Regulation](#).

If you would like to exercise any of those rights, please:

- Email (info@heritage-management.co.uk) or write to us at Paxton House, Waterhouse Lane, Kingswood, Surrey KT20 6EJ.
- let us have enough information to identify you e.g. full name, address and property address.
- let us have proof of your identity and address (a copy of your driving licence or passport and a recent utility or credit card bill).
- let us know the information to which your request relates, including any account or reference numbers, if you have them.

11. KEEPING YOUR PERSONAL INFORMATION SECURE

We have appropriate security measures in place to prevent personal information from being accidentally lost or used or accessed in an unauthorised way. We limit access to your personal information to those who have a genuine business need to know it. Those processing your information will do so only in an authorised manner and are subject to a duty of confidentiality. We also have procedures in place to deal with any suspected data security breach. We will notify you and any applicable regulator of a suspected data security breach where we are legally required to do so.

12. HOW TO COMPLAIN

We hope that we can resolve any query or concern you raise about our use of your information. The [General Data Protection Regulation](#) also gives you right to lodge a complaint with a supervisory authority, in particular in the European Union (or European Economic Area) where you work, normally live or where any alleged infringement of data protection laws occurred. The supervisory authority in the UK is the Information Commissioner who may be contacted at <https://ico.org.uk/concerns/> or telephone.

13. CHANGES TO THIS PRIVACY NOTICE

This privacy notice was published in April 2018 and last updated on 10 April 2018. We may change this privacy notice from time to time, and when we do, we will inform you.

14. DO YOU NEED EXTRA HELP?

If you would like this notice in another format please contact us (see 'How to contact us' above).