

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.

At Principle Estate Management LLP & Principle Estate Services Ltd (“Principle”), we take your privacy very seriously and encourage you to read this notice and any other similar notices we may provide to you 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 the supervisory authorities in the event you have a complaint. We are required to notify you of this information under the General Data Protection Regulation (GDPR).

WHO WE ARE

Principle collects, uses, and is responsible for certain personal information about you in compliance with the GDPR which applies across the European Union (including in the United Kingdom). We are responsible, in conjunction with our clients, as ‘joint controllers of that personal information for the purposes of those laws.

In this privacy notice, references to “we” or “us” means Principle.

DATA PROTECTION PRINCIPLES

We will comply with the data protection principles when gathering and using personal information, as set out by the General Data Protection Regulation.

THE PERSONAL INFORMATION WE COLLECT AND USE

i. Information collected by us

When carrying out our duties in relation to the management of your property, and in assisting our clients to fulfil their obligations under the terms of the various building leases, we will collect the following information when you provide it to us:

- ◆ Name
- ◆ Address(es)
- ◆ Telephone number(s)
- ◆ Email address(es)
- ◆ Details of any enquiry you have made or correspondence you have sent



Providing the information above is required from you to enable us to perform our duties as managing agent. We will inform you at the point of collection whether you are required to provide the information to us.

ii. Information collected from other sources

From time to time we may also be given personal information by third parties including (but not limited to) the following:

- ◆ Name, property and home address, contact number(s), email address(es) from previous Managing Agents, or direct from clients
- ◆ Mortgage details and references from banks
- ◆ Death certificates from executors of your estate
- ◆ Evidence of bankruptcy or insolvency

HOW WE USE YOUR PERSONAL INFORMATION

We want to provide the best possible service and data law allows us to collect and use your personal data as part of our legitimate interest in understanding our customers and providing the highest levels of service.

We typically collect and use information to perform a contract you have with our client in accordance with our role as managing agent or for the purposes of our legitimate interests or those of a third party.

We seek to ensure that the way we collect and process information is always proportionate and we will notify you of any material changes to information we collect or to the purposes for which we collect and process it.

WHO WE SHARE YOUR PERSONAL INFORMATION WITH

From time to time, when required in order to perform our contract as managing agent, we may share the following categories of personal data:

- ◆ Name and contact details
- ◆ Service charge, ground rent, or other account balance
- ◆ Other information that you have voluntarily shared with us, such as correspondence or complaints

This personal information may be shared with the following types of recipients:

- ◆ Accountants, solicitors, debt collection agencies, insurers, regulatory authorities, contractors, staff employed by us, out of hours service providers, IT support teams.

We will share personal information with law enforcement or other authorities required by law.

WHERE YOUR PERSONAL INFORMATION MAY BE HELD

Information may be held at our offices and those of our third party agencies, service providers, and other representatives. We have measures in place to seek to ensure there is appropriate security for information we hold.

HOW LONG YOUR PERSONAL INFORMATION WILL BE KEPT

Whenever we collect or process your personal data, we will only keep it for as long as necessary for the purpose for which it was collected.

We will retain information for the period we manage the property and up to 12 years following this period in order to comply with best practice. We have facilities within our real estate management software to archive records which anonymises personal data.

At the end of the retention period, your data will be deleted.

REASONS WE CAN COLLECT AND USE YOUR PERSONAL INFORMATION

We rely on “contract” as the lawful basis on which we collect and use your personal data in order to fulfil our duties in our management agreements.

We rely on “consent” as the lawful basis on which we collect and use your personal data for the Principle Customer Portal.

YOUR RIGHTS

Under Data Protection law, you have a number of data protection rights. In summary these include the following:

The right to be informed – you have the right to be informed about the collection of your personal data and transparency over how we use this information.

The right to access – you have the right to access the personal data we hold about you and to certain other supplementary information that this Privacy Notice is designed to address.

The right to rectification – you have the right to request that we correct any information you believe is inaccurate or incomplete.

The right to erasure – you have the right to request the deletion or removal of your personal data, in certain circumstances.

The right to restrict processing – you have the right to request that we restrict the processing of your personal data, under certain conditions.

The right to object to processing – you have the right to object to our processing of your personal data, under certain circumstances.

The right to data portability – you have the right to request that we transfer the data that we have collected to another organisation, or directly to you, under certain conditions.

For further information on each of these rights, including the circumstances in which they apply, see 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 contact us via email: info@principleestate.co.uk. Call us at: 0121 289 4315. Or write to us: The Data Controller, Principle, 137 Newhall Street, Birmingham, B3 1SF.

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.

CONTACTING THE REGULATOR

We hope that we can resolve any query or concern you raise about our use of your information. If you have a query or complaint about how we have used your data, please contact us at info@principle.co.uk.

If you feel that your data has not been handled correctly, or you are unhappy with our response to any requests you have made to us regarding the use of your personal data, you have the right to lodge a complaint with the Information Commissioner's Office.

You can contact them on 0303 123 113 or online via [Make a complaint | ICO](#) (please note we cannot be responsible for the contents of external websites).

CHANGES TO THIS PRIVACY POLICY

This privacy notice was last updated on 08/04/2021. We may change this privacy notice from time to time and when we do a revised copy will be uploaded to our website or is available on request.