Privacy Policy

What does this document do?

This Privacy Notice describes how personal data we collect from our clients will be collected, stored and processed. It also explains your privacy choices when using our website as well as your right to access your information under the Data Protection Act (DPA) 2018 and the General Data Protection Regulation (GDPR).

Risdons Solicitors LLP is registered in England and Wales under registration number OC450671. Our registered office address is Mendip House, 1 High Street, Taunton, Somerset, TA1 3SX. We are authorised and regulated by the Solicitors Regulation Authority (SRA). Our SRA number is 8007524. For the purposes of the Data Protection legislation Risdons Solicitors LLP is the data controller. Edward Judge (Partner) is the Data Compliance Manager (DCM).

What information do we hold?

To operate efficiently, Risdons Solicitors LLP has to collect and use information about people. This may include current, past and prospective employees, clients, customers and suppliers. In addition, we may be required to collect and use information to comply with regulatory requirements. This personal information must be handled and dealt with properly, however it is collected, recorded and used, and whether it be on paper, in computer records or recorded by any other means, and there are safeguards within the Act to ensure this.

The Company regard the lawful and correct treatment of personal information as very important to our successful operation and to maintaining the confidence of clients, and we will ensure that we treat personal information law- fully and correctly.

We will never sell your data.

Personal data we collect about you

The table below sets out the personal data we will or may collect while advising and/or acting for you:

Personal data we will collect	**Personal data we may collect depending on why you have instructed us**
Your name, address and telephone number	Your National Insurance and tax details
Information to enable us to check and verify your ID e.g.: your email address and mobile phone number	Your bank and/or building society details

Personal data we will collect	Personal data we may collect depending on why you have instructed us
Information relating to the matter in which you are seeking our advice or representation	Details of your spouse/partner and dependents or other family members e.g.: if you instruct us on a family matter or a Will
Information to enable us to undertake credit or other financial checks on you	Your nationality and immigration status and information from related documents, such as your passport
Your financial details so far as relevant to your instructions e.g.: the source of your funds if you are instructing us in a purchase transaction	Your employment status and details including salary and benefits e.g.: if you instruct us on matters related to your employment or in which your employment status or income is relevant
Information about your use of our IT, communication and other systems and other monitoring information e.g.: if using our secure online client portal	Details of your pension arrangements, e.g. if you instruct us on a pension matter or in relating to financial arrangements following breakdown of a relationship
	Details of your overall financial position including bank accounts, investments and property and that of your spouse, partner if you instruct us in a family matter
	Your medical records e.g. if we are acting for you in a personal injury claim

How your personal data is collected

We collect most of this information from you directly or via our secure online client portal. However, we may also collect information:

- From publicly accessible sources, e.g. Companies House or HM Land Registry
- Directly from third party, e.g.: Sanctions screening providers
- Credit reference agencies
- Client due diligence providers
- From a third party with your consent, e.g.: Your Bank or Building Society, another financial institution or advisor
- Consultants and other professionals we may engage in relation to your matter
- Your employer and/or trade union, professional body or pension administrators
- Your doctors, medical and occupational health professionals

- Via our website
- Via our information technology (IT) systems, e.g.: Case management, document management and time recording systems

Why Do We Need To Collect Personal Information?

Where you have instructed us to carry out work on your behalf, we must obtain necessary personal data to do that work. You have the right to refuse to provide that data, if you do so we may not be able to proceed with the trans- action.

Under Data Protection Legislation we may collect personal data:

- To fulfil a contract we have with you, or
- When it is our legal duty, or
- When you consent to it, or
- When it is in our legitimate interest (provided it does not unfairly go against what is right and best for you. If we rely on our legitimate interest, we will tell you what that is.)

What will we use your personal data for?

Under Data Protection law, we can only use your personal data if we have a proper reason for doing so, e.g.:

- To comply with our legal and regulatory obligations;
- For the performance of our contract with you or to take steps at your request before entering into a contract;
- For our legitimate interests or those of a third party; or
- Where you have given consent

A legitimate interest is when we have a business or commercial reason to use your information, so long as your own rights and interests do not override this. The following tables explain what we use (process) your personal data for and our reasons for doing so.

What we use your personal data for	Our reasons
To provide legal services to you	For the performance of our contract with you or to take steps at your request before entering into contract
Conducting checks to identify our clients and verify their identity Screening for financial and other sanctions or embargoes Other processing necessary to comply with professional, legal and regulatory obligations that apply to our business, eg under Health and Safety Regulations or Rules issued by our professional regulator To comply with our legal and regulatory obligations	To comply with our legal and regulatory obligations
Gathering and providing information required by or relating to audits, enquiries or investigations by regulatory bodies	To comply with our legal and regulatory obligations
Ensuring business policies are adhered to e.g. policies covering security and internet use	For our legitimate interests or those of a third party, i.e. to be as efficient as we can so we can deliver the best service for you at the best price
Operational reasons, such as improving efficiency, training and quality control	For our legitimate interests or those of a third party, i.e.: to be as efficient as we can so we can deliver the best service for you at the best price
Ensuring the confidentiality of commercially sensitive information	For our legitimate interests or those of a third party, i.e.: to protect our intellectual property and other commercially valuable information To comply with our legal and regulatory obligations

What we use your personal data for	Our reasons
Statistical analysis to help us manage our practice	For our legitimate interests or those of a third party, i.e.: to be as efficient as we can so we can deliver the best service for you at the best price
Preventing unauthorised access and modifications to our systems	For our legitimate interests or those of a third party, i.e. to prevent and detect criminal activity that could be damaging for us and for you To comply with our legal and regulatory obligations
Updating and managing client records	For the performance of our contract with you or to take steps at your request before entering into a contract To comply with our legal and regulatory obligations For our legitimate interests or those a third party, e.g.: making sure that we can keep in touch with our client about existing and new services
Statutory Returns	To comply with our legal and regulatory obligations
External audits and quality checks e.g. for CQS and the audit of our accounts	For our legitimate interests or those of a third party i.e.: to maintain our accreditations so we can demonstrate we operate at the highest standards To comply with our legal and regulatory obligations

How will we process your personal data?

We will do so in accordance with the Data Protection Legislation and shall ensure that your personal data:

- Shall be processed fairly and lawfully and shall not be processed unless specific conditions are met
- Shall be obtained only for one or more specified and lawful purposes and shall not be further processed in any manner incompatible with that purpose or those purposes
- Shall be adequate, relevant and not excessive in relation to the purpose or purposes for which is it processed
- Shall be accurate and where necessary, kept up to date
- Shall not be kept for longer than is necessary for that purpose or those purposes
- Shall be processed in accordance with the right of data subjects under the Act
- Shall be kept secure and protected by an appropriate degree of security
- Shall not be transferred to a country or territory outside the European Economic Area, unless that country or territory ensures an adequate level of data protection

We do not use any form of automated decision making process to make decisions about you.

Your rights under the data protection legislation

You have the following rights:

- The right to be informed that processing is being undertaken
- The right of access to one's personal information within the statutory one-month period
- The right to prevent processing in certain circumstances
- The right to correct, rectify, block or erase information regarded as wrong information
- The right to be forgotten or to have your personal data erased subject to the regulation provisions set out below

In addition to your rights, we will ensure that:

- There is someone with specific responsibility for data protection in the organization
- Everyone managing and handling personal information understands that they are responsible for following good data protection practice
- Everyone managing and handling personal information is appropriately trained to do so
- Everyone managing and handling personal information is appropriately supervised
- Anyone wanting to make enquiries about handling personal information, whether a member of staff or a member of the public, knows what to do
- Queries about handling personal information are promptly and courteously dealt with
- Methods of handling personal information are regularly assessed and evaluated

- Performance with handling personal information is regularly assessed and evaluated

- Data sharing is carried out under a written agreement, setting out the scope and limits of the sharing. Any disclosure of personal data will be in compliance with approved procedures

For further information on these rights, including the circumstances in which they apply, please contact us or see the Guidance from the UK Information Commission's Office (ICO) on individuals' rights under the General Data Protection Regulation.

Whom we might share your personal information with

We may need to provide your personal data to third parties for the following purposes:-

- If it is necessary for the completion of the work that you have asked us to carry out, *e.g. we may instruct a Barrister or provide your information to the Land Registry*

- To other parties where it is necessary for the administration of our business, eg to a costs draftsman in the case of Legal Aid or Personal Injury work, or to companies to whom we outsource administrative and sup- port tasks

- Where we need to do so to comply with our regulatory and legal obligations

- For prevention of fraud and money laundering

Where appropriate, all contractors who are users of personal information supplied by Risdons Solicitors will be re- quired to confirm that they will abide by the requirements of the Data Protection Legislation with regard to information supplied to them by us.

Sharing your information with fraud prevention agencies

To comply with the law and for our own legitimate interest to enable us to assess and manage risk, we can share details about your financial situation and financial history, and the financial situation and history of individuals connected to your business with fraud prevention agencies.

We will carry out checks with fraud prevention agencies for the purposes of preventing fraud and money laundering, and to verify your identity and the identity of individuals connected to your business before we provide ser- vices to you. These checks require us and these agencies to process information about you and individuals connected to your business.

The information you provide or which we have collected from you, or on your behalf, including from individuals connected to your business or received from third parties, will be used to carry out these checks in order to prevent fraud and money laundering, and to verify your identity and the identity of individuals connected to your business. This includes information such as name, address, date of birth, contact details, financial information and employment details.

We and fraud prevention agencies may also enable law enforcement agencies to access and use information about you and individuals connected to your business to detect, investigate, and prevent crime.

We process this information on the basis that we have a legitimate interest in preventing fraud and money laundering and to verify your identity and the identity of individuals connected to your business. This enables us to protect our business and to comply with laws that apply to us.

Fraud prevention agencies can hold information for different periods of time. If they are concerned about a possible fraud or money laundering risk this information and data can be held by them for up to six years.

How long will we keep your personal information?

We will keep your personal information for a minimum of 6 years after the end of your case.

This period may be longer depending upon the type of matter. The person responsible for your case will inform you of the relevant retention period for your matter.

We may retain this data for one of these reasons:-

- To respond to any questions or complaints
- To show that we treated you fairly
- To maintain records according to rules that apply to us
- To comply with our regulatory obligations to act in your interests
- To protect our own legitimate interests

We will retain your name, address, date of birth, email and other contact details indefinitely. This is because we need this information to carry out conflict of interest checks in compliance with our regulatory obligations. We will not use this information to contact you unless you have specifically given us authorisation to do so, or unless we have a legal obligation.

We will always make sure that your privacy is protected and only use your personal data for one of the purposes listed above.

Keeping your personal data secure

We have appropriate security measures to prevent personal data from being accidentally lost, or used or accessed unlawfully. We limit access to your personal data to those who have a genuine business need to access 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.

If you want detailed information from Get Safe Online on how to protect your information and your computers and devices against fraud, identity theft, viruses and many other online problems, please visit: www.getsafeonline.org

(Get Safe Online is supported by HM Government)

What if your personal information is incorrect?

You are responsible for making sure the information you give us is accurate and up to date and you must tell us if anything changes as soon as possible.

You have the right to question any information we have about you that you think is wrong or incomplete. Please contact us if you want to do this. If you do, we will take reasonable steps to check its accuracy and correct it.

What if you want us to stop using your personal information?

You have the right to object to our use of your personal information, or to ask us to delete, remove or stop using your personal information if there is no need for us to keep it.

There may be legal or other official reasons why we need to keep or use your data, but please tell us if you think that we should not be using it. We may be able to restrict the use of your data meaning that it can only be used for certain things, such as legal claims or to exercise legal rights.

What to do if you have any questions or complaint

Questions or requests in connection with this Policy should be addressed by email to:
edward.judge@risdons.co.uk

Or by writing to:
Mr E Judge | Risdon Hosegood
1 Mendip House, High Street, Taunton Somerset TA1 3SX

Or by calling into any of our offices in person

You will also need to provide sufficient information to identify you, e.g. full name, address and client or matter reference number). We will also need proof of your identity and address (a copy of your driving licence or passport and a recent utility or credit card bill);

If you consider we have breached data protection laws, you have the right to make a complaint under our Data Protection Complaints Policy. A copy of the policy can be found on our website. If you are dissatisfied with the outcome of any complaint raised under the Data Protection Complaints Policy you can contact the Information Commission's Office (ICO), the UK's supervisory authority: Information Commission's Office, Wycliffe House, Water Lane, Wilmslow, Cheshire, SK9 5AF (www.ico.org.uk). However, before doing so please make sure you have first made your complaint to us or asked us for clarification if there is something you do not understand. The ICO will expect you to have done this before reviewing your complaint.

Changes to this Privacy Notice

This Privacy Notice was last updated June 2026