

	Personal Information Required	Why We Hold The Data	How Long We Hold The Data For	Where We Store The Data	Businesses We May Pass Information To	Who We Receive Data From	Regular Marketing Communication	Ability To Opt-Out	Ability To Remove
Property Buyer - Residential Sales	Name, address, email, telephone number (s)	Client contact	Whilst active	Paper files locked in cabinets or in alarmed offices. Password protected CRM	Mortgage, solicitor and removal firms - prior consent is obtained. Property data feed providers. Integrated Interest (email marketing). Property seller and other agents in the chain - when necessary	Website Provider (Homeflow). Property Portals. Professional Referrals. Inter-office referrals. Integrated Interest (email marketing)	Property news. Cross - selling of relevant services	Yes	Yes
	Financial information	Proof of finances when necessary	During the purchase. Once complete this is held in an alarmed office for approx. 3 years, then securely held for 7 years at secure space storage		Other agents in the chain. Other solicitors in the chain. Seller - when necessary				
	Solicitors details	When purchasing							
	Address ID and or photo ID.	Money Laundering Act. Biometric Residence Permit (where applicable)							
Property Seller - Residential Sales	Name, address, email, telephone number (s)	Client contact	Whilst active	Password protected CRM system. Paper files locked in cabinets or in alarmed offices	Mortgage, solicitor and removal firms - prior consent is obtained. Integrated Interest (email marketing). Property buyer - when necessary. Other agents in the chain - when necessary	Website Provider (Homeflow). Property Portals. Professional Referrals. Inter-office referrals. Integrated Interest (email marketing)	Property news. Cross - selling of relevant services	Yes	Yes
	Property questionnaire	Material Information (Trading Standards). Consumer Protection. Misrepresentation Act Proof of finances when necessary	During the purchase. Once complete this is held in an alarmed office for approx. 3 years, then securely held for 7 years at secure space storage		Other agents in the chain. Other solicitors in the chain. Buyer when necessary				
	Financial information	When selling							
	Solicitors details	Legal requirement Signed Terms of Business							
	EPC Signature								
	Property keys	By prior arrangement	Keys in alarmed offices	EPC, floorplanner, surveyors, select contractors and photographers - by arrangement only.					

	Address ID and or photo ID	Money Laundering Act		Password protected CRM system. Paper files locked in cabinets or in alarmed offices					
Residential Landlords	Name, address, email, telephone number (s)	Client contact	Whilst active		Property data feed providers. Integrated Interest (email marketing). Goodlord. Flixflow. Tenancy Deposit Scheme. HMRC. EPC Provider. Inventory Provider. Contractor. Local Council. Tenant	Website Provider (Homeflow). Property Portals. Professional Referrals. Inter-office referrals. Integrated Interest (email marketing)	Property news. Cross - selling of services	Yes	Yes
	Financial information	Bank details							
	Overseas landlord form (if applicable)	Tax requirement							
	Proof of consent (if the property is mortgaged)	Legal requirement	During the rental period. Once complete this is held in an alarmed office for approx. 3 years, then securely held for 7 years at secure space storage	Password protected CRM system. Paper files locked in cabinets or in alarmed offices					
	Rent Guarantee Policy	Only with prior consent							
	Signature	Terms of Business & Tenancy Agreement							
	ID check	Money Laundering Act							
	Utilities	Meter readings							
	Gas safety	Legal requirement							
	Council tax	Payment							
	EICR	Legal requirement							
	EPC	Legal requirement							
	Smoke and carbon monoxide safety	Legal requirement							
	Inventory company	Only with prior consent							
	TDS	Legal requirement							
	Contractors	If specific companies used							
	Property keys	By prior arrangement		Keys in alarmed offices					
Residential Tenant/Guarantor	Name, address, email, telephone number (s)	Client contact	Whilst active	Password protected CRM system. Paper files locked in cabinets or in alarmed offices	Integrated Interest (email marketing). Goodlord. Flixflow. Tenancy Deposit Scheme. HMRC. EPC Provider. Inventory Provider. Local Council. Contractor. Landlord	Website Provider (Homeflow). Property Portals. Professional Referrals. Inter-office referrals. Integrated Interest (email marketing)	Marketing of properties. Property News. Cross-selling of services	Yes	Yes
	Signature	Terms of Business & Tenancy Agreement							
	Smoker								
	Pets								
	Children (and ages)								
	Occupation & salary								
	ID check								
	Proof of Residency - utility bill/council tax								
	Co-habiting tenants - length of rental partnership								
	If Self-Employed tax returns, accounts and bank statements	All part of referencing	During the rental period. Once complete this is held in an alarmed office for approx. 3 years, then securely held for 7 years at secure space storage						
	Adverse credit history/CCJ's								
	Proof of earnings								
	Savings/Pensions/Housing Benefits								
	Previous landlord information								

	Bank card details Immigration Act - Right to Rent form Tenancy Deposit Scheme Inventory company Contractors Utilities Council Tax	Deposit payment Legal requirement Legal requirement Only with prior consent Only with prior consent Payment Payment	During the rental period. Once complete this is held in an alarmed office for approx. 3 years, then securely held for 7 years at secure space storage						
Block Management	Personal Information Required	Why We Hold The Data	How Long We Hold The Data For	Where We Store The Data	Businesses We May Pass Information To	Who We Receive Data From	Regular Marketing Communication	Ability To Opt-Out	Ability To Remove
Residents Management Compnay (RMC), Right to Manage or Freeholder	Name, address, email, telephone number (s) Financial information Signature Insurance companies	Client contact Service charge Terms of Business To complete relevant forms - Lifts, Employers Liability, Enginnering, Pumps, Gates	Whilst active	Password protected system. Paper files locked in cabinets or in alarmed offices. Keys in alarmed offices.	Insurance companies. Companies House. Conotractors - with permission. Integrated Interest (email marketing)	Website Provider (Homeflow). Professional Referrals. Inter-office referrals. Integrated Interest (email marketing)	No	Yes	Yes
Property Tenant	Name, address, email, telephone number (s)	Client contact	Whilst active	Password protected system. Paper files locked in cabinets or in alarmed offices. Keys in alarmed offices	Contractors - with permission. Integrated Interest (email marketing)	Website Provider (Homeflow). Professional Referrals. Inter-office referrals. Integrated Interest (email marketing)	No	Yes	Yes

Commercial	Personal Information Required	Why We Hold The Data	How Long We Hold The Data For	Where We Store The Data	Businesses We May Pass Information To	Who We Receive Data From	Regular Marketing Communication	Ability To Opt-Out	Ability To Remove
Commercial Property Seller	<p>Name, address, email, telephone number (s)</p> <p>Solicitors details Property keys Signature Address ID and or photo ID</p>	<p>Client contact</p> <p>When selling Terms of Business Money Laundering Act</p>	Whilst active	Password protected system. Paper files locked in cabinets or in alarmed offices.	Mortgage, solicitor, photographer, floor planner, epc supplier, local council and removal firms - prior consent is obtained. Property data feed providers. Property buyer. Other agents in the chain - when necessary. Integrated Interest (email marketing)	Website Provider (Homeflow). Property Portals. Professional Referrals. Inter-office referrals. Integrated Interest (email marketing)	No	Yes	Yes
Commercial Property Buyer	<p>Name, address, email, telephone number (s)</p> <p>Financial information Solicitors details</p> <p>Address ID and or photo ID</p>	<p>Client contact</p> <p>Proof of finances when necessary When selling</p> <p>By prior arrangement</p>	<p>Whilst active</p> <p>During the purchase. Once complete this is held in an alarmed office for approx. 3 years, then securely held for 7 years at secure space storage</p>	Password protected system. Paper files locked in cabinets or in alarmed offices.	Mortgage, solicitor and removal firms - prior consent is obtained. Integrated Interest (email marketing). Property Seller - when necessary. Other agents in the chain, when necessary	Website Provider (Homeflow). Property Portals. Professional Referrals. Inter-office referrals. Integrated Interest (email marketing)	No	Yes	Yes
Commercial Landlords	<p>Name, address, email, telephone number (s)</p> <p>Financial information Signature ID check Overseas landlord form (if applicable) Gas Safety EICR EPC Smoke and Carbon monoxide Safety</p>	<p>Client contact</p> <p>Bank details Terms of Business & Tenancy Agreement Money Laundering Act Legal requirement Legal requirement Legal requirement Legal requirement</p>	<p>Whilst active</p> <p>During the rental period. Once complete this is held in an alarmed office for approx. 3 years, then securely held for 7 years at secure space storage</p>	Password protected system. Paper files locked in cabinets or in alarmed offices.	Property data feed providers. Integrated Interest (email marketing). HMRC. EPC Provider. Inventory Provider. Contractor. Tenant.	Website Provider (Homeflow). Property Portals. Professional Referrals. Inter-office referrals. Integrated Interest (email marketing)	No	Yes	Yes

Commercial Tenant	<p>Name, address, email, telephone number (s)</p> <p>Signature</p> <p>ID check</p> <p>Previous landlord information</p> <p>Business financials</p> <p>Business information</p>	<p>Client contact</p> <p>Terms of Business & Tenancy Agreement</p> <p>Money Laundering Act</p> <p>Part of referencing</p> <p>Part of referencing</p>	<p>Whilst active</p> <p>During the rental period. Once complete this is held in an alarmed office for approx. 3 years, then securely held for 7 years at secure space storage</p>	<p>Password protected system. Paper files locked in cabinets or in alarmed offices.</p>	<p>Integrated Interest (email marketing). Contractor. Landlord.</p>	<p>Website Provider (Homeflow). Property Portals. Professional Referrals. Inter-office referrals. Integrated Interest (email marketing)</p>	No	Yes	Yes
Commercial Client - Professional Valuations	<p>Name, address, email, telephone number (s)</p>	<p>Client contact</p>	<p>Whilst active - these are held in an alarmed office</p>	<p>Password protected system. Paper files locked in cabinets or in alarmed offices.</p>	<p>Integrated Interest (email marketing).</p>	<p>Website Provider (Homeflow). Property Portals. Professional Referrals. Inter-office referrals. Integrated Interest (email marketing)</p>	No	Yes	Yes
Rural & Agricultural	Personal Information Required	Why We Hold The Data	How Long We Hold The Data For	Where We Store The Data	Businesses We May Pass Information To	Who We Receive Data From	Regular Marketing Communication	Ability To Opt-Out	Ability To Remove
Property Buyer	<p>Name, address, email, telephone number (s)</p> <p>Financial information</p> <p>Solicitors details</p> <p>Address ID and or photo ID</p>	<p>Client contact</p> <p>Proof of finances when necessary</p> <p>When purchasing</p> <p>Money Laundering Act</p>	<p>Whilst active</p> <p>During the purchase. Once complete this is held in an alarmed office for approx. 3 years, then securely held for 7 years at secure space storage</p>	<p>Password protected system. Paper files locked in cabinets or in alarmed offices.</p>	<p>Mortgage, solicitor and removal firms - prior consent is obtained. Integrated Interest (email marketing). Property seller and other agents in the chain - when necessary</p>	<p>Website Provider (Homeflow). Property Portals. Professional Referrals. Inter-office referrals. Integrated Interest (email marketing)</p>	No	Yes	Yes
Property Seller	<p>Name, address, email, telephone number (s)</p> <p>Solicitors details</p>	<p>Client contact</p> <p>When selling</p>	<p>Whilst active</p>	<p>Password protected system. Paper files locked in cabinets or in alarmed offices.</p>	<p>Mortgage, solicitor and removal firms - prior consent is obtained. Property data feed providers. Integrated Interest (email marketing). Property seller and other</p>	<p>Website Provider (Homeflow). Property Portals. Professional Referrals. Inter-office referrals. Integrated Interest (email marketing)</p>	No	Yes	Yes

	Signature	Signed Terms of Business	During the purchase. Once complete this is held in an alarmed office for approx. 3 year, then securely held for 7 years at secure space storage	Keys in alarmed offices					
	Property keys	By prior arrangement							
	Address ID and or Photo ID	Money Laundering Act							
Agricultural Client	Name, address, email, telephone number (s)	Client contact			Integrated Interest (email marketing).	Website Provider (Homeflow). Property Portals. Professional Referrals. Inter-office referrals. Integrated Interest (email marketing)	No	Yes	Yes
	Address ID and or photo ID	If necessary	Whilst active - these are held in an alarmed office	Password protected system. Paper files locked in cabinets or in alarmed offices.					
	Signature	Terms of Business							
	Solicitors details	If necessary							

Planning Department	Personal Information Required	Why We Hold The Data	How Long We Hold The Data For	Where We Store The Data	Businesses We May Pass Information To	Who We Receive Data From	Regular Marketing Communication	Ability To Opt-Out	Ability To Remove
Planning Clients	<p>Name, address, email, telephone number (s)</p> <p>Copies of plans of land and buildings, Land Registry Titles and plans</p> <p>Copies of personal documents used as evidence to support an application</p>	<p>Client Contact</p> <p>Notify landowners of applications</p> <p>For the completion of planning application documents and Community Infrastructure Levy forms under The Town and Country Planning (Development Management Procedure) (England) Order 2015 (as amended) The Town and Country Planning Act 1990 (as amended) The Community Infrastructure Levy Regulations 2010</p>	<p>Throughout the course of any instruction. Ongoing for client contact pursuant to the original instruction and as a record of application documents.</p>	<p>Password protected CRM system. Paper files locked in cabinets or in alarmed offices</p>	<p>Planning Portal, County or District Councils or their appointed subcontractors. Other parties and external consultants as agreed with the client</p>	<p>Website Provider (Homeflow). Property Portals. Professional Referrals. Inter-office referrals. Council websites.</p>	No	Yes	Yes