

# Privacy policy

## 1. Introduction

- 1.1 We are committed to safeguarding the privacy of our customers.
- 1.2 This policy applies where we are acting as a data controller with respect to the personal data of our customers; in other words, where we determine the purposes and means of the processing of that personal data.
- 1.3 We do not use cookies on our website.
- 1.4 Our website does not collect personal data and thus does not incorporate privacy controls which affect how we will process your personal data.
- 1.5 In this policy, "we", "us" and "our" refer to H. J. Jefferies Ltd. [ For more information about us, see Section 13.]

## 2. How we use your personal data

"Personal data" is defined in Article 4(1) of the GDPR:

"(1) 'personal data' means any information relating to an identified or identifiable natural person ('data subject'); an identifiable natural person is one who can be identified, directly or indirectly, in particular by reference to an identifier such as a name, an identification number, location data, an online identifier or to one or more factors specific to the physical, physiological, genetic, mental, economic, cultural or social identity of that natural person".

Article 13(1) of the GDPR provides that:

"(1) Where personal data relating to a data subject are collected from the data subject, the controller shall, at the time when personal data are obtained, provide the data subject with all of the following information: ... (c) the purposes of the processing for which the personal data are intended as well as the legal basis for the processing; (d) where the processing is based on point (f) of Article 6(1), the legitimate interests pursued by the controller or by a third party".

Article 6(1)(f) of the GDPR provides that:

"(1) Processing shall be lawful only if and to the extent that at least one of the following applies: ... (f) processing is necessary for the purposes of the legitimate interests pursued by the controller or by a third party, except where such interests are overridden by the interests or fundamental rights and freedoms of the data subject which require protection of personal data, in particular where the data subject is a child."

2.1 In this Section 2 we have set out:

- (a) the general categories of personal data that we may process;
- (b) the purposes for which we may process personal data; and
- (c) the legal bases of the processing.

- 2.2 The data may include your address, telephone number, email address, referral source. The source of the usage data is from you alone. We do not obtain any data about you from any other sources. This data may be processed for the purposes of providing the services you request. The legal basis for this processing is our legitimate interests, namely providing services.
- 2.3 We may process information contained in any enquiry you submit to us regarding goods and/or services ("**enquiry data**"). The enquiry data may be processed for the purposes of offering relevant goods and/or services to you. The legal basis for this processing is our legitimate interests, namely the performance of a contract between you and us and/or taking steps, at your request, to enter into such a contract.
- 2.4 We may process information relating to our customer relationships, including customer contact information ("**customer relationship data**"). The customer relationship data may include your name, your employer, your job title or role, your contact details, and information contained in communications between us and you or your employer. The source of the customer relationship data is you or your employer. The customer relationship data may be processed for the purposes of managing our relationships with customers, communicating with customers, keeping records of those communications and promoting our products and services to customers. The legal basis for this processing is our legitimate interests, namely the performance of a contract between you and us and/or taking steps, at your request, to enter into such a contract.
- 2.5 We may process information relating to transactions, including purchases of goods and services, that you enter into with us ("**transaction data**"). The transaction data may include your contact details, your card details and the transaction details. The transaction data may be processed for the purpose of supplying the purchased goods and services and keeping proper records of those transactions. We do not store card details. The legal basis for this processing is our legitimate interests, namely the performance of a contract between you and us and/or taking steps, at your request, to enter into such a contract.
- 2.6 We may process information contained in or relating to any communication that you send to us ("**correspondence data**"). The correspondence data may include the communication content. The correspondence data may be processed for the purposes of communicating with you and record-keeping. The legal basis for this processing is our legitimate interests, namely the performance of a contract between you and us and/or taking steps, at your request, to enter into such a contract.
- 2.7 We may process any of your personal data identified in this policy where necessary for the establishment, exercise or defence of legal claims, whether in court proceedings or in an administrative or out-of-court procedure. The legal basis for this processing is our legitimate interests, namely the protection and assertion of our legal rights, your legal rights and the legal rights of others.
- 2.8 We may process any of your personal data identified in this policy where necessary for the purposes of obtaining or maintaining insurance coverage, managing risks, or obtaining professional advice. The legal basis for this processing is our legitimate interests, namely the proper protection of our business against risks.

- 2.9 In addition to the specific purposes for which we may process your personal data set out in this Section 2, we may also process any of your personal data, where such processing is necessary, for compliance with a legal obligation to which we are subject, or in order to protect your vital interests or the vital interests of another natural person.
- 2.10 Please do not supply any other person's personal data to us, unless we prompt you to do so. The only time we will ask for this is when the legal ownership of a grave is in doubt, in which case we may need to contact the owner. The legal basis for this processing is our legitimate interests, namely the performance of a contract between you and us and/or taking steps, at your request, to enter into such a contract.

### **3. Providing your personal data to others**

- 3.1 We will not disclose your personal data to any other person, company or authority unless necessary under the terms of the contract. We will notify you of any such communication. The legal basis for this processing is our legitimate interests, namely the performance of a contract between you and us and/or taking steps, at your request, to enter into such a contract.
- 3.2 We may disclose your personal data to our insurers and/or professional advisers insofar as reasonably necessary for the purposes of obtaining or maintaining insurance coverage, managing risks, obtaining professional advice, or the establishment, exercise or defence of legal claims, whether in court proceedings or in an administrative or out-of-court procedure.
- 3.3 Financial transactions relating to our services are handled by our payment services providers, *Payzone UK*. We will share transaction data with our payment services providers only to the extent necessary for the purposes of processing your payments, refunding such payments and dealing with complaints and queries relating to such payments and refunds. You can find information about the payment services providers' privacy policies and practices at [www.payzone.co.uk](http://www.payzone.co.uk).
- 3.4 In addition to the specific disclosures of personal data set out in this Section 4, we may disclose your personal data where such disclosure is necessary for compliance with a legal obligation to which we are subject, or in order to protect your vital interests or the vital interests of another natural person. We may also disclose your personal data where such disclosure is necessary for the establishment, exercise or defence of legal claims, whether in court proceedings or in an administrative or out-of-court procedure.

### **5. Retaining and deleting personal data**

Article 5(1)(e) of the GDPR sets out the storage limitation, one of the fundamental rules of the regime:

"Personal data shall be: ... kept in a form which permits identification of data subjects for no longer than is necessary for the purposes for which the personal data are processed; personal data may be stored for longer periods insofar as the personal data will be processed solely for archiving purposes in the public interest, scientific or historical research purposes or statistical purposes in accordance with Article 89(1) subject to implementation

of the appropriate technical and organisational measures required by this Regulation in order to safeguard the rights and freedoms of the data subject ... ".

5.1 This Section 5 sets out our data retention policies and procedure, which are designed to help ensure that we comply with our legal obligations in relation to the retention and deletion of personal data.

5.2 Personal data that we process for any purpose or purposes shall not be kept for longer than is necessary for that purpose or those purposes.

5.3 We will retain your personal data as follows:

personal data will be retained for a minimum period of six years following the date of order, and for an indefinite period for historical record purposes only.

5.4 Notwithstanding the other provisions of this Section 5, we may retain your personal data where such retention is necessary for compliance with a legal obligation to which we are subject, or in order to protect your vital interests or the vital interests of another natural person.

## **6. Amendments**

6.1 We may update this policy from time to time by publishing a new version on our website.

6.2 You should check this page occasionally to ensure you are happy with any changes to this policy.

6.3 We may notify you of significant changes to this policy by email or through the postal system.

## **7. Your rights**

7.1 In this Section 7, we have summarised the rights that you have under data protection law. Some of the rights are complex, and not all of the details have been included in our summaries. Accordingly, you should read the relevant laws and guidance from the regulatory authorities for a full explanation of these rights.

Article 13(2) of the GDPR provides that, where personal data is collected from a data subject, certain information about data subject rights must be provided:

"In addition to the information referred to in paragraph 1, the controller shall, at the time when personal data are obtained, provide the data subject with the following further information necessary to ensure fair and transparent processing: ... (b) the existence of the right to request from the controller access to and rectification or erasure of personal data or restriction of processing concerning the data subject or to object to processing as well as the right to data portability; (c) where the processing is based on point (a) of Article 6(1) or point (a) of Article 9(2), the existence of the right to withdraw consent at any time, without affecting the lawfulness of processing based on consent before its withdrawal; ...".

Similar provisions are set out in Article 14 in relation to personal data which is not collected from the relevant data subject.

7.2 Your principal rights under data protection law are:

- (a) the right to access;
- (b) the right to rectification;
- (c) the right to erasure;
- (d) the right to restrict processing;
- (e) the right to object to processing;
- (f) the right to data portability;
- (g) the right to complain to a supervisory authority; and
- (h) the right to withdraw consent.

7.3 You have the right to confirmation as to whether or not we process your personal data and, where we do, access to the personal data, together with certain additional information. That additional information includes details of the purposes of the processing, the categories of personal data concerned and the recipients of the personal data. Providing the rights and freedoms of others are not affected, we will supply to you a copy of your personal data. The first copy will be provided free of charge, but additional copies may be subject to a reasonable fee.

The right to access is set out in Article 15 of the GDPR.

7.4 You have the right to have any inaccurate personal data about you rectified and, taking into account the purposes of the processing, to have any incomplete personal data about you completed.

The right to rectification is set out in Article 16 of the GDPR.

7.5 In some circumstances you have the right to the erasure of your personal data without undue delay. Those circumstances include: the personal data are no longer necessary in relation to the purposes for which they were collected or otherwise processed; you withdraw consent to consent-based processing; you object to the processing under certain rules of applicable data protection law. However, there are exclusions of the right to erasure. The general exclusions include where processing is necessary: for compliance with a legal obligation; or for the establishment, exercise or defence of legal claims.

The right to erasure (or right to be forgotten) is set out in Article 17 of the GDPR, and must be notified to data subjects under Articles 13(2)(b), 14(2)(c) and 15(1)(e) of the GDPR.

7.6 In some circumstances you have the right to restrict the processing of your personal data. Those circumstances are: you contest the accuracy of the personal data; processing is unlawful but you oppose erasure; we no longer need the personal data for the purposes of our processing, but you require personal data for the establishment, exercise or defence of legal claims; and you have objected to processing, pending the verification of that objection. Where processing has been restricted on this basis, we may continue to store your personal data. However, we will only otherwise process it: with your consent; for the establishment, exercise or defence of legal claims; or for the protection of the rights of another natural or legal person.

Article 18(1) of the GDPR states:

"The data subject shall have the right to obtain from the controller restriction of processing where one of the following applies: (a) the accuracy of the personal data is contested by the data subject, for a period enabling the controller to verify the accuracy of the personal data; (b) the processing is unlawful and the data subject opposes the erasure of the personal data and requests the restriction of their use instead; (c) the controller no longer needs the personal data for the purposes of the processing, but they are required by the data subject for the establishment, exercise or defence of legal claims; (d) the data subject has objected to processing pursuant to Article 21(1) pending the verification whether the legitimate grounds of the controller override those of the data subject.

7.7 You have the right to object to our processing of your personal data on grounds relating to your particular situation, but only to the extent that the legal basis for the processing is that the processing is necessary for: the performance of a task carried out in the exercise of any official authority vested in us; or the purposes of the legitimate interests pursued by us or by a third party. If you make such an objection, we will cease to process the personal information unless we can demonstrate compelling legitimate grounds for the processing which override your interests, rights and freedoms, or the processing is for the establishment, exercise or defence of legal claims.

The right to object to processing is detailed in Article 21 of the GDPR, and must be notified to data subjects under Articles 21(4), 13(2)(b) and 14(2)(c).

7.8 To the extent that the legal basis for our processing of your personal data is:

- (a) consent; or
- (b) that the processing is necessary for the performance of a contract to which you are party or in order to take steps at your request prior to entering into a contract,

and such processing is carried out by automated means, you have the right to receive your personal data from us in a structured, commonly used and machine-readable format. However, this right does not apply where it would adversely affect the rights and freedoms of others.

7.9 If you consider that our processing of your personal information infringes data protection laws, you have a legal right to lodge a complaint with a supervisory authority responsible for data protection. You may do so in the EU member state of your habitual residence, your place of work or the place of the alleged infringement.

The right to lodge a complaint with a supervisory authority is set out in Article 77 of the GDPR, and must be notified to data subjects under Articles 13(2)(d), 14(2)(e) and 15(1)(f).

7.10 To the extent that the legal basis for our processing of your personal information is consent, you have the right to withdraw that consent at any time. Withdrawal will not affect the lawfulness of processing before the withdrawal.

Article 7(3) of the GDPR sets out the right of withdrawal. The right must be notified to data subjects under Articles 13(2)(c) and 14(2)(d). See also Article 17(1)(b).

7.11 You may exercise any of your rights in relation to your personal data by written notice to us.

## **8. About cookies**

8.1 A cookie is a file containing an identifier (a string of letters and numbers) that is sent by a web server to a web browser and is stored by the browser. The identifier is then sent back to the server each time the browser requests a page from the server.

8.2 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.

8.3 Cookies do not typically contain any information that personally identifies a user, but personal information that we store about you may be linked to the information stored in and obtained from cookies.

## **10. Cookies that we use**

10.1 We do not use cookies for any of the following purposes:

- (a) *authentication* – we do not use cookies to identify you when you visit our website and as you navigate our website;
- (b) *status* - we do not use cookies to help us to determine if you are logged into our website as none is necessary;
- (c) *personalisation* - we do not use cookies to store information about your preferences and to personalise the website for you;
- (d) *security* - we do not use cookies as an element of the security measures used to protect user accounts, as no such accounts exist;
- (e) *advertising* - we do not use cookies to help us to display advertisements that will be relevant to you;
- (f) *analysis* - we do not use cookies to help us to analyse the use and performance of our website and services; and
- (g) *cookie consent* - we do not use cookies to store your preferences in relation to the use of cookies more generally.

## **11. Cookies used by our service providers**

11.1 Our service providers may use cookies and those cookies may be stored on your computer when you visit our website. No personally identifiable information is collected.

11.2 We use Google Analytics to analyse the use of our website. Google Analytics gathers information about website use by means of cookies. The information gathered relating to our website is used to create reports about the use of our website. No personally identifiable information is collected. Google's privacy policy is available at: <https://www.google.com/policies/privacy/>.

11.3 We do not publish Google AdSense interest-based advertisements on our website to reflect your interests. To determine your interests, Google may track your behaviour on websites across the web using cookies. To determine your interests, Google may track your behaviour on websites across the web using cookies. This behaviour tracking allows Google to tailor the advertisements that you see on other websites to reflect your interests (but we do not publish interest-based advertisements on our website). You can view, delete or add interest categories associated with your browser by visiting: <https://adssettings.google.com>. You can also opt out of AdSense partner network cookies using those settings or using the Network Advertising Initiative's multi-cookie opt-out mechanism at: <http://optout.networkadvertising.org>. However, these opt-out mechanisms themselves use cookies, and if you clear the cookies from your browser your opt-out will not be maintained. To ensure that an opt-out is maintained in respect of a particular browser, you may wish to consider using the Google browser plug-ins available at: <https://support.google.com/ads/answer/7395996>.

## **12. Managing cookies**

12.1 Most browsers allow you to refuse to accept cookies and to delete cookies. The methods for doing so vary from browser to browser, and from version to version. You can however obtain up-to-date information about blocking and deleting cookies via these links:

- (a) <https://support.google.com/chrome/answer/95647?hl=en> (Chrome);
- (b) <https://support.mozilla.org/en-US/kb/enable-and-disable-cookies-website-preferences> (Firefox);
- (c) <http://www.opera.com/help/tutorials/security/cookies/> (Opera);
- (d) <https://support.microsoft.com/en-gb/help/17442/windows-internet-explorer-delete-manage-cookies> (Internet Explorer);
- (e) <https://support.apple.com/kb/PH21411> (Safari); and
- (f) <https://privacy.microsoft.com/en-us/windows-10-microsoft-edge-and-privacy> (Edge).

12.2 Blocking all cookies will have a negative impact upon the usability of many websites.

## **13. Our details**

13.1 Our website is owned by H. J. Jefferies Ltd and operated by *H. J. Jefferies Ltd*.

13.2 We are registered in [England and Wales] under registration number 492279 and our registered office and principal place of business is at Westerleigh Road, Downend, Bristol, BS16 6AH.

13.4 You can contact us:

- (a) by post, to the postal address given above;
- (b) using our website contact form;

- (c) by telephone, on the contact number published on our website; or
- (d) by email, using the email address published on our website.