

Willow Estates Privacy Statement

Your privacy is important to us. This privacy statement explains what personal data Willow Estates collects from you through our interactions with you, and how we use that data.

Personal data that we collect

As an estate agency business, we collect and hold information for 4 types of customer. These are listed as follows along with the type of information we hold about them:

- Potential vendors
- Vendors
- Applicants
- Buyers

Potential vendors

The usual first step in the process of selling your home is asking for a valuation on your property. If contacted to provide this service, we would record information about the potential vendor such as NAME, CONTACT DETAILS, ADDRESS, TYPE OF PROPERTY, and REASON FOR THE VALUATION. This information is then used to assess the value of the property in the marketing appraisal appointment. We will then store this information in order to contact the potential vendor on a regular basis until they are ready to put their property on the market. This information will be stored until they have decided they do not want to move home and no longer require the services of an estate agent, or up to a maximum of 2 years, or if they request they no longer want to hear from us. If they have decided to use an alternative estate agent to sell their home, we will store this information until their property sale completes. We will keep in regular contact with them to offer our services in the event of the sale falling through.

Vendors

When a customer instructs Willow Estates to sell their home, we will take more information about the vendor and the property. This includes:

- Identification and proof of residency for each selling party to comply with Anti-Money Laundering regulations.
- Floor plans and measurements of the property.
- Photos and potentially a video tour of the property.
- Details of solicitors and other associated suppliers required to facilitate the sale of a property.

When the property is sold, we will also keep information with regards to the sales chasing process. This includes detailed notes as to how the sale is progressing.

Applicants

Applicants are potential buyers looking to view property with Willow Estates and/or to register on a mailing list. We will record and store names, contact details, and the property requirements of the registered applicant. We will store this information until they have found a property to buy through another estate agency, or they request to be removed from our applicant mailing list, or if they haven't found a property within 12 months of registering with us.

Buyers

A buyer is an applicant who is in the process of buying a property through Willow Estates. In addition to the information held when initially registering with us, we will also store

- Identification and proof of residency for each buying party to comply with Anti-Money Laundering regulations
- Proof of ability to pay for the property. This could be a mortgage agreement in principle, or proof of cash via a bank statement or building society passbook. • Solicitor's details and or mortgage broker details to facilitate the purchase going through to completion.

How we collect this information

Data regarding customers is gathered from telephone calls received into the office, customer visits to the office, through enquiries via the Willow Estates website, and through enquiries via property portals including Zoopla and Onthemarket.com.

We will also collect further customer data during the normal process of estate agency business. This includes

- Viewings
- Viewing feedback
- Property matching
- Any other relevant estate agency activities

How we store your data:

Data is stored electronically on our servers of our estate agency software provider, Vebra Alto. Any personal data sent to us, either in writing or email, maybe insecure in transit and we cannot guarantee its delivery, so any transmission is at your own risk. Willow Estates also keep manual paper files. These contain the sole agency agreement signed by the vendors, Identification and proof of residency for both the vendors and buyers, copy of the memorandum of sale, and proof of ability to pay for the purchase from the buyer. These files are secured in a lockable filing cabinet which is then stored in a lockable office location at Willow Estates, 35 Thomas Street, Llanelli, SA15 3JE.

How long we keep this information

- **Applicants:** Maximum of 12 months from initial registration, or until they find a property through another estate agency, or if they ask to be removed from our mailing list.
- **Potential vendors:** Maximum of 24 months, or they complete on their sale through another estate agency, or if they request not to be contacted by us for estate agency services.
- **Vendors:** All transaction information is retained for 7 years from date of transaction as a legal requirement imposed by HMRC. Other information is retained under the legal requirements imposed by the Estate Agency Act 1979, Consumers, Estate Agents and Redress Act 2007, and to comply with the Property Ombudsman code of practise for Estate Agents. All other information is retained for 7 years after the sale has completed under a legitimate business interest.
- **Buyers:** All transaction information is retained for 7 years from date of transaction as a legal requirement imposed by HMRC. Other information is retained under the legal requirements imposed by the Estate Agency Act 1979, Consumers, Estate Agents and Redress Act 2007, and to comply with the Property Ombudsman code of practise for Estate Agents. All other information is retained for 7 years after the sale has completed under a legitimate business interest.

How we use personal data

Willow Estates will use the data we collect to operate our business and facilitate the sale and/or purchases of properties within the United Kingdom residential housing market. This includes using data to improve our service and personalise the client's home moving experience.

We also use data to communicate with clients, and to offer RELEVANT property related services by 3rd party suppliers to improve, enhance, or help clients with the home moving process. These include:

- Conveyancing services
- Mortgage services
- Removal services
- Surveying services
- House clearance and property maintenance services
- EPC assessors
- Other relevant tradesman (Damp proofing, electricians for example)

Offers of 3rd party suppliers will only be communicated whilst you are an existing customer of Willow Estates, and/or there is an EXISTING CUSTOMER RELATIONSHIP in place.

Reasons we share personal data:

Willow Estates share client's personal data with your consent, or as necessary to complete any transaction in the home moving process that the client has requested or authorised.

We also share data with Willow Estates controlled affiliates and subsidiaries, when required by law, or to respond to legal process, or to protect our customers, or to protect lives, and to protect the rights or property of Willow Estates.

If sharing personal data with Willow Estates affiliates, then the information will be relevant to the home moving process and will only be used to improve, enhance, or help the clients' home moving experience.

How to access and control your personal data:

You can request to view, edit, or delete your personal data at any time by contacting the data controller of Willow Estates. Email properties@willow-estates.com with the subject line of Data Privacy.

You can also choose whether you wish to receive promotional emails, SMS, telephone calls, and postal correspondence from Willow Estates. You can also opt out from receiving marketing messages by emailing the data controller/Willow Estates at properties@willow-estates.com