



Data Protection Statement

Your personal data is data which by itself or with other data available to us can be used to identify you. We are Caesar & Howie, the data controller. This data protection statement sets out how we will use your personal data.

The types of personal data we collect and use

Whether or not you become a client, we will use your personal data as set out below. If you become a client we will use your personal data to manage the service we are providing to you. We will collect most of this data at the start of your transaction. Personal data we may collect and use will include:-

Full name and personal details including contact information (eg home address and address history, email address, home and mobile telephone numbers).

Date of birth.

Financial details (eg for mortgage and insurance applications).

Employment status (eg for mortgage and insurance applications).

Personal data about other named persons (eg beneficiaries or attorneys when the service being provided concerns preparing for the future).

The legal grounds for using your personal data

Data protection laws require that, where we process your personal data, we must satisfy at least one prescribed condition for processing. These are set out in data protection law and we rely on a number of different conditions for the activities we carry out.

1. As necessary to perform our contract with you for the relevant service you have requested.
2. As necessary for our own legitimate interests eg to send you marketing communications.
3. As necessary to comply with a legal obligation eg to verify your identity and make anti-money laundering checks.
4. Based on your consent eg when we use cookies to collect information about the device you use to access our website. Sometimes third parties collect this

on our behalf. You will be asked to consent to this before using our website. Please see our cookie policy on our website <http://www.liftmortgage.co.uk>.

Sharing your personal data

Subject to applicable data protection law, we may share you personal data with:

Companies and other organisations providing services to us to allow us to progress and complete the relevant service you have requested.

Legal and other professional advisers.

Organisations for income verification, anti money laundering and affordability checks.

Government bodies and agencies eg HMRC.

Courts, to comply with legal requirements.

Other parties connected with the service we are providing.

Data Retention

We will retain your data based on our regulatory requirements as a minimum. It may be that your data is retained for longer so that we can help with queries and for our legitimate interest of informing you of legal services which may be of interest or necessary.

Your rights

You have the right to be informed about our processing of your personal data.

You have the right to have your personal data corrected if it is inaccurate and to have personal data completed if incomplete.

You have the right to object to the processing of your personal data but if you do we will be unable to deliver the service you have requested.

You have the right to restrict processing of your personal data but if you do we may be unable to deliver the service you have requested.

You have the right to have your personal data forgotten but if you do we will be unable to advise you of any change in the law which may affect you or will be unable to advise you of any services you may require.

You have the right to request access to your personal data and how we process it.

You have the right to complain to the ICO (the Information Commissioner's Office) who can be found at www.ico.org.uk.