

**Broadleaf Management Services Limited**  
**Privacy Policy**

The General Data Protection Regulation (known as the “GDPR”) came into effect on 25<sup>th</sup> May 2018 and we have updated our Privacy Policy which gives you some important information on how we will hold and process your personal information.

**Overview**

1. The type of information we collect about you
2. How we collect it and use it
3. Who we might share it with
4. How long to we keep it (Data Retention)
5. Information Security
6. The steps we will take to make sure it stays private and secure
7. Your rights to your information
8. Who we are and how to contact us

**Who “we” are**

When we say “we” we mean Broadleaf Management Services Limited who is the data controller and processor for the management of retirement housing developments.

**The information we collect**

We collect information about you from:

- Directly from you – Personal Data and Bank Details
- From a third party acting on your behalf i.e. Scheme Manager, family member or Solicitor
- Directly from you by using our website such as details of visits, pages viewed and the resources you access. Such information includes traffic data, location data and other communication data.

**The data we will collect from you:**

Name, address, telephone number, nationality, gender, marital status, e-mail, next of kin, family members, General Practitioners, medical conditions, religious beliefs, special requirements.

Bank details if you have completed a direct debit form.

Data from our website such as details of visits, pages viewed and resources you access. Such information includes traffic data, location data and other communication data.

**How we will use your information**

We will use your information to:

- a) Hold your name, address, telephone number and email on our property management system to allow us to raise service charge demands, ground rent or ground rent equivalent demands, car parking charges, shed rents or any other demands we are entitled to raise under your lease/freehold transfer.

- b) Hold your bank details if you have provided us with them to collect service charges, ground rent, ground rent equivalent, car parking charges, shed rents or any other demands we are entitled to raise under your lease/freehold transfer, via direct debit.
- c) Hold the personal data you have provided within the “Residents Details Form” on-site for the use of the Scheme Manager for dealing with an emergency should it arise. The personal data provided within the “Residents Details Form” will also be held at Broadleaf Head Office for use in an emergency.
- d) Pass on the personal data provided within the “Residents Details Form” to the appointed 24-hour careline service (if applicable) to enable them to deal with an emergency should it arise.
- e) If you are a Shareholder, Member, Director or Officer of a Limited Company ie. Freehold Company or Right to Manage Company where Broadleaf act as Company Secretary we will hold your information to provide share and membership certificates, to comply with Company Law and make the necessary returns to Companies House and to provide Companies House with appointments, terminations and shareholder information as required under Company Law.
- f) If we have collected your data via our website, we will hold your data to provide information to you that you request from us relating to our products or services. To inform you of any changes to our website, services or products.

### **When can we use your information**

Where we use your information, it is for the purposes of our **legitimate interests** and we have made sure that your information, and your rights in relation to that information, are protected. We only use this information to carry out our duties as a managing agent within the retirement housing industry.

### **Who we will share your information with**

We will share any personal data (not bank details) you provide within the Residents Details Form with the appointed 24-hr careline provider to allow them to deal with an emergency should it arise.

We will use your bank details to collect direct debit payments should you wish to pay your services charges, ground rent, ground rent equivalent, car parking charges, shed rent or any other payment due under your lease/freehold transfer by this method.

We do not share your data with any other companies other than the 24-hr careline provider.

We provide details of shareholders, members, directors or officers of Limited Companies where Broadleaf act as Company Secretary to Companies House as required under Company Law.

We do not share any information collected from our website to any other party.

### **How long we will keep your information**

We will keep your information for as long as you have a relationship with us. After the relationship ends, we will keep it where we may need it for our legitimate purposes e.g. to help us respond to queries or complaints.

## **Information Security**

We work hard to keep your data safe. We use a combination of technical, administrative and physical control to maintain the security of your data. This includes encryption on our computers. No method of transmitting or storing data is completely secure, however if you have a security-related concern please contact us at the address provided below.

## **Your rights**

You have several rights to your information these are:

The right to be informed

The right of access

The right to rectification

The right to erasure

The right to restrict processing

The right to data portability

The right to object

Rights in relation to automated decision making and profiling

If you require further information on Your Rights – then please contact Broadleaf at Head Office who will provide you with our “Individual Rights Policy”

## **Reviewing and Updating this Policy**

We will review this policy on a regular basis and should there be any changes we will provide you with an updated copy of the policy.

## **Contact us:**

Should you wish to contact us to discuss this Privacy Policy or to invoke any of your rights then please write, telephone or e-mail:

**Broadleaf Management Services Limited, Manor View Offices, The Cross, Burley,  
Hampshire, BH24 4AB      01425 403767      info@broadleaf.com**