

Privacy Notice

At Upstanding Enterprises & Developments Limited ('Upstanding') we are committed to ensuring that your privacy is protected. By using our website (www.upstanded.com) you are agreeing to be bound by this policy. You can be assured that any information we ask you to provide on our website will only be used in accordance with this Privacy Statement.

If you use our website, or send/receive communications to/from us, you should regularly check this page as this policy may, from time to time, be changed or updated.

How and why we collect information

If you are visiting our website, or if we are in contact with you by other means (email, telephone, letter) the personal information we collect might include your name, address, email address, telephone number, IP address, the nature of the relationship with you (eg. client, vendor, supplier, contractor, professional adviser, development neighbour) and information regarding what website pages are accessed and when.

Upstanding provides a variety of services including land and property acquisition and sales, project planning, construction projects, property development, and we work with a variety of partners and suppliers in the provision of the above services. In providing our service Upstanding gathers personal data for the purposes of carrying out and monitoring, evaluating and improving our services. We may contact you to obtain further information (for example to deal with a complaint, enquiry, survey).

Information may be obtained directly from partners, clients, suppliers and service providers. This information may be obtained face to face, via telephone, via facsimile, through email or completion of online documentation. Where the information is requested it is to enable us to provide our services to our clients and to operate effectively as a business. If you opt not to provide such information/personal data we may not be able to provide/continue to provide that service.

What type of information is collected.

The type of personal information that we may obtain includes the following:

- Name and personal details including contact information for any self-employed individuals or sub-contractors who may conduct work on your/our behalf.
- To meet any other regulatory or relevant legislative requirements e.g. if requested to provide such data as part of an audit or requested to do so by regulators or by HMRC etc.
- If you are using our website we may keep details of your visits to our site including, but not limited to: traffic data, location data, resources that you access and communication data.
- The gathering of policy details for any Insurance products, memberships, certifications
- Special categories of Your Personal Data or your clients Personal Data including characteristics information (such as gender, age).

What we do with the information we gather

We may use the information you provide for the following purposes:-

- To improve our products and services
- To properly respond to your enquiries
- To carry out our obligations arising from any contracts entered into by you and us
- Meet any regulatory obligations in the services we provide
- To provide an audit trail and records for the purposes of dealing with claims
- From time to time, we may also use your information to contact you for research purposes. We may contact you by email, phone or letter and may use the information to customise this website, or our other services (including surveys, feedback forms).
- To use in information we share with others about our services. This may include: evaluation with development partners, testimonials (website and printed media), survey data, references.

What is the lawful basis on which we will hold personal data?

To carry out our legitimate business and professional management responsibilities which include, but are not limited to: providing our land and property services, adhering to CDM (2015) Regulations, and to adhere to anti money laundering requirements and investigating and resolving any complaints.

We will use your personal data to comply with any legislative or good practise obligations for record keeping for the purposes of audits and reviews, records of transactions undertaken and customer histories, or for any other wider compliance with any legal or regulatory obligation to which we might be subject.

To respond to any legitimate legal requests for information about you for example to the Regulatory authority, HMRC, or pursuant to an order of any court or tribunal having relevant jurisdiction, or as required by law for the purposes of but not limited to combatting fraud, money-laundering and criminal activities.

When we provide our services to you, or you provide services to us, we do so on the basis that both parties are entering a contract for the supply of services. We have the right to use the personal data we hold in order to perform that contract, and to arrange the services that you require.

Alternatively, either in the course of initial discussions with you or when the contract between us has come to an end, we have the right to use the personal data provided it is in our legitimate business interest to do so and your rights are not affected. For example, we may need to respond to requests from product providers, insurance providers or third party service providers, relating to the service we have provided for you, or you have provided for us, or to make contact with you to seek feedback on the service you received.

The basis on which we will process personal data

In providing our services to you we may process data about your ethnic origin, health or medical history (special data).

We may process data relating to historic or current criminal convictions or offences (together “**Criminal Disclosures**”). This is relevant to insurance related activities such as underwriting, claims and fraud management.

We will use Special Data and any Criminal Disclosures in the same way as we use Personal Data as set out in this Privacy Notice.

What happens to personal data when it is disclosed to us?

In the course of handling Personal Data, we will:

- Record and store Personal Data in our paper files, mobile devices and on our computer systems (email, hard drives, and cloud facilities). This information can only be accessed by employees within Upstanding and the other companies directly within our group structure or that provide services to our group and only when it is necessary to provide our service to you and to perform any administration tasks associated with or incidental to that service.
- Enter Personal Data into spreadsheets, databases and software/tools in order to deliver our services and meet the requirements of your or our business e.g. to benefit from the functionality that this brings and to produce outputs that form part of our client/service operations.
- Submit Personal Data to Product Providers and Insurance Product providers, both in paper form and on-line/by fax via a secure portal or encrypted messaging. The provision of this information to a third party would only take place if it is essential in allowing us to progress any enquiry or administrative service made on your behalf and to deal with any additional questions or administrative issues providers may raise.
- Use Personal Data for the purposes of responding to any queries you may have in relation to any service we provide or services you provide to us, or to inform you of any developments in relation to those services of which we might become aware

How long is information retained?

From time to time we may be required by legislation to retain records for specified periods. As part of our service we may retain records in order to assist you in meeting the legislative record retention requirements of your business. These vary dependent upon the nature of the service concerned. Where that is the case we may hold Data to enable you or us to meet any legislative or regulatory requirements at least until the end of any specified limitation period imposed by the regulator/legislator concerned. Importantly, we will not retain information for longer than is necessary e.g. for longer than the period that is laid down, without a lawful reason for doing so.

Who has access to your information?

We will not sell or rent your information to third parties. We will not share your information with third parties for marketing purposes. From time to time your Personal Data will be shared with:

- Other companies within our group structure and only when it is appropriate to provide our services. For details on the Privacy Notices of our other companies within our group please contact us on the address above and we will be pleased to assist you.
- Third parties to assist us in the delivery of our services to you or the contracts into which we enter e.g. to assist us with analysis, enquiry or applications, or who are able to support your needs as identified. These third parties may include but are not limited to: our Compliance advisers, product specialists, third party research/ analysis firms, estate agents, providers of legal, accountancy, IT and other back office support services.

In each case, your Personal Data or that of your clients will only be shared for the purposes set out in this privacy notice.

Please note that this sharing of Your Personal Data or your clients Personal Data does not entitle such third parties to send you marketing or promotional messages: it is shared to ensure we can adequately fulfil our responsibilities to you, and as otherwise set out in this Privacy Notice.

Your rights in relation to your information

The accuracy of your information is important to us. Where we provide a service to you, or you provide a service to us or enter into a contract with us, the information will reflect your situation at that time and we will not normally update this; apart from a change of contact information or any details which we specifically need to update for the purposes of carrying out the contracts or services (eg. renewal of insurance policies or certification expiry).

Under new EU requirements you have a number of specific rights, these are summarised below:

Access – You may ask for a copy of the information **Upstanding** holds about you and we will provide this within one month of receipt free of charge (we may charge a fee for subsequent or duplicate requests).

Rectification - You may ask us to correct any information that we hold that is inaccurate or incomplete.

Erasure – You may ask us to delete or cease processing data in certain situations. Please note that we will have regulatory obligations to retain information for certain time periods and we will retain such information as we believe is necessary to fulfil these obligations.

Restrict processing – You may ask us to cease processing information. This means that we will be able to retain it but no longer act upon it. In the event that you no longer need our services and terminate them we will automatically cease processing information.

Portability – You may have the right to have your data transferred to another service provider in an appropriate electronic format.

Objection – You may have the right to object to us processing information or using it for marketing purposes.

This is a brief summary of your rights and there may be restrictions on some of them. If you wish to explore any of these rights at any time please contact us on the address above and we will be pleased to assist you.

Security precautions in place to protect the loss, misuse or alteration of your information.

When you give us personal information, we take steps to ensure that it is retained securely and processed in a confidential manner.

Information may be transmitted normally over the Internet, and this can never be guaranteed to be 100% secure. As a result, while we strive to protect all personal information, we cannot guarantee the security of any information that passes between us, and you should consider the risk of this. Once we receive your information, we make our best effort to ensure its security on our systems. Where we have given (or where you have chosen) a password which enables you to access certain websites relevant to our services, you are responsible for keeping this password confidential. We ask you not to share your password with anyone.

We also expect you to take reasonable steps to safeguard your own privacy when transferring information to us, such as not sending confidential information over unprotected e-mail, ensuring e-mail attachments are password protected or encrypted and only using secure methods of postage when original documentation is being sent to us.

Use of 'cookies'.

Like many other websites, our website uses cookies. We may use cookies to provide the services, features and functionality offered on our website and to improve our user experience. Cookies are small files or other pieces of data which are downloaded or stored on your computer or other device, that can be tied to information about your use of our website (including any third party services and features offered as part of our website).

By using our website you agree to such use of cookies unless you later decide to disable them. Please note that if you delete or disable our cookies you may experience interruptions in or limitations of functionality in certain areas of the website.

Links to other websites

Our website may contain links to other websites run by other organisations. This privacy policy applies only to our website, so we encourage you to read the privacy statements on the other websites you visit. We cannot be responsible for the privacy policies and practices of other sites even if you access them using links from our website.

In addition, if you linked to our website from a third party site, we cannot be responsible for the privacy policies and practices of the owners and operators of that third party site and recommend that you check the policy of that third party.

Transferring your information outside of Europe

As part of the services offered to you, or by you to us, the information which you provide to us may be transferred to countries outside the European Union ("EU"). By way of example, this may happen if any of our servers are from time to time located in a country outside of the EU. These countries may not have similar data protection laws to the UK. By submitting any personal data, you are agreeing to this transfer, storing or processing. If we transfer personal data outside of the EU in this way, we will take steps to ensure that appropriate security measures are taken with the aim of ensuring that your privacy rights continue to be protected as outlined in this Privacy Notice.

Contacting you

We will make appropriate contact with you to provide the agreed services, to respond to your enquiries, or to operate the contracts into which we enter.

If we feel we have a legal right not to deal with your request, or to action it in different way to how you have requested, we will inform you of this at the time.

You should also make contact with us as soon as possible on you becoming aware of any unauthorised disclosure of your Personal Data, so that we may investigate and fulfil our own regulatory obligations.

Right to complain

If you believe that we are not holding your information correctly or are unhappy at any dealings with us regarding your information you may complain to the Information Commissioners Office. You can do this via their website <https://ico.org.uk/concerns> or by calling 0303 123 1113.

Review of this policy

We keep this Policy under regular review and it was last reviewed in February 2022..

This website is created using wix.com and is subject to their terms of use. You can view the wix.com privacy policy by clicking the link here.

If you believe that any information we are holding on you is incorrect or incomplete, please write to or email us as soon as possible,. We will promptly correct any information found to be incorrect.

Any questions regarding this Privacy Notice and our privacy practices should be sent by e-mail to tim@upstanded.com or to The Data Controller, South Lodge, Smithy Mills Lane, Adel, Leeds LS16 8HF. Alternatively, you can telephone 01823 765123.