

Schedule 5
Data about third parties who are involved, directly or indirectly, in matters (including cases or transactions) in relation to which we are asked to advise or represent our clients.

What we collect	Source	Purpose	Legal basis	Recipients
Contact information	Home and/or work addresses	Individual himself or herself	Our legitimate interests in performing our instructions.	Our client.
	Landline/mobile phone or fax numbers	Our client or its professional advisers	The legitimate interest of our client in us performing its instructions.	Other professional advisers of our client.
	Email addresses	Other parties involved in matter	Compliance with a legal obligation	Other parties and/or their professional advisers involved in a matter where required as part of the conduct of the matter.
	Previous addresses			Government bodies (such as HMRC) Courts, tribunals, local authorities, the Land Registry, where required as part of the conduct of the matter.
Employment information:	Position/Title	Individual himself or herself		UK regulatory and law enforcement bodies, where required of us under UK law or regulation.
	Employment history	Our client		Our service providers (such as data storage, typing, administrative support and audit)
	Professional specialisms			
	Qualifications			
		For use in order to fulfil our instructions	Our legitimate interests in performing our instructions	Our client. Other professional advisers of our client. Other parties and/or their professional advisers involved

What we collect	Source	Purpose	Legal basis	Recipients
	<p>Other professional advisers</p> <p>Other parties involved in matter</p> <p>Third party information sources</p>		<p>The legitimate interest of our client in us performing its instructions</p> <p>Compliance with a legal obligation</p>	<p>in a matter where required as part of the conduct of the matter.</p> <p>Government bodies (such as HMRC) Courts, tribunals, local authorities, the Land Registry, where required as part of the conduct of the matter.</p> <p>UK regulatory and law enforcement bodies, where required of us under UK law or regulation.</p> <p>Our service providers (such as data storage, typing, administrative support and audit)</p>
Interests	<p>Professional and personal interests</p> <p>Individual himself or herself</p> <p>Other parties involved in matter</p> <p>Third party information sources</p>	<p>For use in order to fulfil our instructions</p>	<p>Our legitimate interests in performing our instructions</p> <p>The legitimate interest of our client in us performing its instructions.</p>	<p>Our client.</p> <p>Other professional advisers of our client.</p> <p>Other parties and/or their professional advisers involved in a matter where required as part of the conduct of the matter.</p> <p>Government bodies (such as HMRC) Courts, tribunals, local authorities, the Land Registry, where required as part of the conduct of the matter.</p>

What we collect	Source	Purpose	Legal basis	Recipients
Financial information	<p>Bank details</p> <p>Transaction history</p>	<p>Individual himself or herself</p> <p>Our client</p> <p>Other professional advisers</p> <p>Other parties involved in matter</p> <p>Third party information sources, such as credit reference databases</p>	<p>Captured when we receive or make a payment to/from an individual, or make payments on behalf of an individual and retained as evidence of the transactions.</p>	<p>Our service providers (such as data storage, typing, administrative support and audit)</p> <p>Our client.</p> <p>Other professional advisers of our client.</p> <p>Our bank.</p> <p>Other parties and/or their professional advisers involved in a matter where required as part of the conduct of the matter.</p> <p>Government bodies (such as HMRC) Courts, tribunals, local authorities, the Land Registry, where required as part of the conduct of the matter.</p> <p>UK regulatory and law enforcement bodies, where required of us under UK law or regulation.</p> <p>Our service providers (such as data storage, typing, administrative support and audit)</p>
Other	<p>Other information which is relevant to our retainer and which is supplied to us or obtained by us in order to fulfil our instructions from our</p>	<p>Individual himself or herself</p> <p>Our client</p>	<p>For use in order to fulfil our instructions</p>	<p>Our client</p> <p>Other professional advisers of our client.</p> <p>Our legitimate interests in performing our instructions.</p>

What we collect	Source	Purpose	Recipients
<p>client. The nature of the information will depend upon the matter concerned but may include:</p> <p>Copies of correspondence, messages and documents written by or to the individual.</p> <p>Information about health (for example in the context of medical treatment or employment disputes or private wealth planning)</p> <p>Information about the individual's sex life (for example in the context of matrimonial matters)</p> <p>Information about trade union membership in the context of employment matters.</p> <p>Information about an individual's health, family or financial circumstances, where we are acting as a fiduciary or advising fiduciary clients, and the processing is required in order to comply with the terms of the trust.</p>	<p>Other professional advisers</p> <p>Other parties involved in matter</p> <p>Third party information sources, such as credit reference databases</p>	<p>The legitimate interest of our client in us performing its instructions.</p> <p>Our legitimate interest in holding information that will enable us to assess, accept and prepare for a potential fiduciary appointment (such as executor of an estate on a client's death)</p> <p>Compliance with a legal obligation (for special category data) the processing is necessary for the establishment, exercise or defence of legal claims.</p>	<p>Other parties and/or their professional advisers involved in a matter where required as part of the conduct of the matter.</p> <p>Government bodies (such as HMRC) Courts, tribunals, local authorities, the Land Registry, where required as part of the conduct of the matter.</p> <p>UK regulatory and law enforcement bodies, where required of us under UK law or regulation.</p> <p>Our service providers (such as data storage, typing, administrative support and audit)</p>