

Schedule 2
Data about individuals who are our clients

Clients should also refer to their Client Care Letter(s) and accompanying Terms of Business

What we collect	Source	Purpose	Legal basis	Recipients
Contact information	Home and work addresses	Individual himself or herself	For contacting individuals where we need to do so as part of our client work	Performance of contract with client
	Landline/mobile phone or fax numbers	Other professional advisers	For marketing our services, in person, or via communications	Consent Our legitimate interests in performing our instructions and in marketing our services.
	Email addresses	Other parties involved in matter	For communications in relation to establishing a client relationship, obtaining evidence of identity of our client, and communications regarding our service and fees	The legitimate interest of our client in us performing its instructions.
	Previous addresses		For use in order to fulfil our instructions	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.
				Government bodies (such as HMRC) Courts, tribunals, local authorities, the Land Registry, where required as part of the conduct of the matter.
				UK regulatory and law enforcement bodies, where required of us under UK law or regulation (for example to SRA)
				Compilers of legal directories (where you have agreed to be a referee)
				Third party processors who provide identity verification services or other compliance checks as part of our compliance processes.
				If one of our lawyers leaves the firm, and he or she knows you personally, we may allow him or her to take a copy of your details to their new firm.

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Employment information:	Position/Title Employment history Professional specialisms Qualifications	Individual himself or herself Other professional advisers Other parties involved in matter	For communications in relation to establishing a client relationship, obtaining evidence of identity of our client, and communications regarding our service and fees For marketing our services, in person, or via communications	Performance of contract with client Consent Our legitimate interests in performing our instructions and in marketing our services 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. Government bodies (such as HMRC) Courts, tribunals, local authorities, the Land Registry, where required as part of the conduct of the matter. UK regulatory and law enforcement bodies, where required of us under UK law or regulation.
Interests	Professional and personal interests	Individual himself or herself Other parties involved in matter	For use in order to fulfil our instructions	Performance of contract with client Consent Our legitimate interests in performing our instructions and in marketing our services. The legitimate interest of our client in us performing its instructions.	Other parties and/or their professional advisers involved in a matter where required as part of the conduct of the matter. Government bodies (such as HMRC) Courts, tribunals, local authorities, the Land Registry, where required as part of the conduct of the matter.
All the above			For marketing our services, in person, or via communications	Our legitimate interests in marketing our services	Third party processors who provide analytical services as part of our performance review,

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				including conducting questionnaires with our clients. Our service providers (such as data storage, typing, administrative support and audit).
Financial information	Bank details Transaction history	Individual himself or herself Other professional advisers Other parties involved in matter Third party information sources, such as credit reference databases	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.	Performance of contract with client Compliance with a legal obligation Our legitimate interests in performing our instructions and establishing our client's ability to pay the costs of a matter UK regulatory and law enforcement bodies, where required of us under UK law or regulation.
ID document information	Information contained in or provided to us as part of our client ID checks. This includes details included in copy personal photo and residential ID documents we receive.	Individual himself or herself Other professional advisers	For communications in relation to establishing a client relationship, obtaining evidence of identity of our client, and communications regarding our service and fees	Compliance with a legal obligation Consent With the consent of the individual, we will provide copies of documents to other

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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 client. The nature of the information will depend upon the matter concerned but may include:</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>Individual himself or herself</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>For use in order to fulfil our instructions</p>	<p>Performance of contract with client</p> <p>Consent</p> <p>Our legitimate interests in performing our instructions and in marketing our services.</p> <p>The legitimate interest of our client in us performing its instructions.</p> <p>Compliance with a legal obligation</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>

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<p>Information about criminal convictions, where these are pertinent to a matrimonial, immigration or litigation matter or where the information is provided for us to assist the client in complying with disclosure obligations.</p>				