**Privacy Notice – Schedule of Processing**

| **Purpose/Activity** | **Type of data** | **Lawful basis for processing including basis of legitimate interest and further description of activity.** | **Further information and Retention Period** |
| --- | --- | --- | --- |
| To register you as a new customer | (a) Identity  (b) Contact | Performance of a contract with you | Retained for as long as you are a client. Any billing information retained for 6 years for tax purposes. |
| To process and deliver our services including:  (a) Manage payments, fees and charges  (b) Collect and recover money owed to us  (c) Provide core services | (a) Identity  (b) Contact  (c) Financial  (d) Transaction | (a) Performance of a contract with you  (b) Necessary for our legitimate interests (to recover debts due to us).  (c) Explicit Consent. | We collect limited personal data as part of our service contracts.  We will retain the information only whilst you are a customer and then it will be securely erased/deleted save for any information that needs to be retained for accounting/tax reporting activity to HMRC. |
| To process any enquiry | (a) Identity  (b) Contact | (a) Necessary for our legitimate interests | When we process a query or question as part of the service, we will need to process your Identity and Contact information in order to respond to your questions.  The question and our response will only be retained for the duration of the time that you are a customer or enquirer and then will be deleted. |
| To manage our relationship with you which will include:  (a) Notifying you about changes to our terms or privacy notice. | (a) Identity  (b) Contact  (c) Profile  (d) Marketing and Communications | (a) Performance of a contract with you  (b) Necessary to comply with a legal obligation  (c) Necessary for our legitimate interests (to keep our records updated and to study how customers use our products/services) | From time to time we may change our policy, terms of use or the way in which the services operate. We may need to process your information to communicate those changes.  Where you are required to accept a change, we will keep a record of that acceptance which may include your personal data to identify you have 2 accepted such changes. |
| To administer and protect our business | (a) Identity  (b) Contact  (c) Technical | (a) Necessary for our legitimate interests (for running our business, to prevent fraud and in the context of a business reorganisation or group restructuring exercise)  (b) Necessary to comply with a legal obligation | Retention period – only for as long as is necessary. May be aggregated and identity removed and will no longer be personal data capable of identifying you.  No more than 12 months if not aggregated. |
| To use data analytics to improve our, products/services, marketing, customer relationships and experiences | (a) Technical  (b) Usage | Necessary for our legitimate interests (to define types of customers for our products and services, to keep our website updated and relevant, to develop our business and to inform our marketing strategy) | Retention period – only for as long as is necessary. May be aggregated and identity removed and will no longer be personal data capable of identifying you.  No more than 12 months if not aggregated. |

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