



VALOREM

SPECIALIST BUSINESS BROKER

Privacy Policy and Procedure

1. Introduction

1.1 We are committed to safeguarding the privacy of our website visitors and clients.

1.2 This policy applies where we are acting as a data controller with respect to the personal data of our website visitors and clients; in other words, where we determine the purposes and means of the processing of that personal data.

1.3 We will ask you to consent to our use of cookies in accordance with the terms of this policy when you first visit our website.

1.4 Our website incorporates privacy controls which affect how we will process your personal data. By using the privacy controls, you can specify whether you would like to receive direct marketing communications and limit the publication of your information. You can access your information held by us using the request form at the bottom of this page.

1.5 In this policy, “we”, “us” and “our” refer to Valorem Limited. For more information about us, see Section 12.

2. How we use your personal data

2.1 In this Section 2 we have set out:

- (a) the general categories of personal data that we may process;
- (b) In the case of personal data that we did not obtain directly from you, the source and specific categories of that data;
- (c) the purposes for which we may process personal data; and
- (d) the legal bases of the processing.

2.2 We may process data about your use of our website and services (“**usage data**”). The usage data may include your IP address, geographical location, browser type and version, operating system, referral source, length of visit, page views and website navigation paths, as well as information about the timing, frequency and pattern of your service use. The source of the usage data is Google Analytics. This usage data may be processed for the purposes of analysing the use of the website and services. The legal basis for this processing is consent or our legitimate interests, namely monitoring and improving our website and services.

2.3 We may process your information (“**account data**”). The account data may include your name, telephone, address and email address. The source of the account data is you or your employer. The account data may be processed for the purposes of operating our website, providing our services, ensuring the security of our website and services, maintaining back-ups of our databases and communicating with you. The legal basis for this processing is consent or our legitimate interests, namely the proper administration of our website and business and possibly the performance of a contract between you and us and/or taking steps, at your request, to enter into such a contract.

2.4 We may process your information included in your personal profile on our website (“**profile data**”). The profile data may include your name, address, telephone number, email address, profile pictures, gender, date of birth, relationship status, interests and hobbies, educational details and employment details. The profile data may be processed for the purposes of enabling and monitoring

your use of our website and services. The legal basis for this processing is consent or our legitimate interests, namely the proper administration of our website and business OR the performance of a contract between you and us and/or taking steps, at your request, to enter into such a contract.

2.5 We may process your personal data that are provided in the course of the use of our services (“**service data**”). The source of the service data is you or your employer. The service data may be processed for the purposes of operating our website, providing our services, ensuring the security of our website and services, maintaining back-ups of our databases and communicating with you. The legal basis for this processing is consent or our legitimate interests, namely the proper administration of our website and business or the performance of a contract between you and us and/or taking steps, at your request, to enter into such a contract.

2.6 We may process information that you post for publication on our website or through our services (“**publication data**”). The publication data may be processed for the purposes of enabling such publication and administering our website and services. The legal basis for this processing is consent or our legitimate interests, namely the proper administration of our website and business or the performance of a contract between you and us and/or taking steps, at your request, to enter into such a contract.

2.7 We may process information contained in any enquiry you submit to us regarding goods and/or services (“**enquiry data**”). The enquiry data may be processed for the purposes of offering, marketing and selling relevant goods and/or services to you. The legal basis for this processing is consent.

2.8 We may process information relating to transactions, including purchases of goods and services, that you enter into with us and/or through our website (“**transaction data**”). The transaction data may include your contact details, your card details and the transaction details. The transaction data may be processed for the purpose of supplying the purchased goods and services and keeping proper records of those transactions. The legal basis for this processing is the performance of a contract between you and us and/or taking steps, at your request, to enter into such a contract and our legitimate interests, namely our interest in the proper administration of our website and business.

2.9 We may process information that you provide to us for the purpose of subscribing to our email notifications and/or newsletters (“**notification data**”). The notification data may be processed for the purposes of sending you the relevant notifications and/or newsletters. The legal basis for this processing is consent or the performance of a contract between you and us and/or taking steps, at your request, to enter into such a contract.

2.10 We may process information contained in or relating to any communication that you send to us (“**correspondence data**”). The correspondence data may include the communication content and metadata associated with the communication. Our website will generate the metadata associated with communications made using the website contact forms. The correspondence data may be processed for the purposes of communicating with you and record-keeping. The legal basis for this processing is our legitimate interests, namely the proper administration of our website and business and communications with users.

2.12 We may process any of your personal data identified in this policy where necessary for the establishment, exercise or defence of legal claims, whether in court proceedings or in an administrative or out-of-court procedure. The legal basis for this processing is our legitimate

interests, namely the protection and assertion of our legal rights, your legal rights and the legal rights of others.

2.13 We may process any of your personal data identified in this policy where necessary for the purposes of obtaining or maintaining insurance coverage, managing risks, or obtaining professional advice. The legal basis for this processing is our legitimate interests, namely the proper protection of our business against risks.

2.14 In addition to the specific purposes for which we may process your personal data set out in this Section 2, we may also process any of your personal data] where such processing is necessary for compliance with a legal obligation to which we are subject in order to protect your vital interests or the vital interests of another natural person.

2.15 Please do not supply any other person's personal data to us, unless we prompt you to do so.

3. Providing your personal data to others

3.1 We may disclose your personal data to any member of our group of companies (this means our subsidiaries, our ultimate holding company and all its subsidiaries) insofar as reasonably necessary for the purposes, and on the legal bases, set out in this policy.

3.2 We may disclose your personal data to our insurers and/or professional advisers insofar as reasonably necessary for the purposes of obtaining or maintaining insurance coverage, managing risks, obtaining professional advice, or the establishment, exercise or defence of legal claims, whether in court proceedings or in an administrative or out-of-court procedure.

3.3 We may disclose enquiry data and service data to our web design and hosting company, Create Designs insofar as reasonably necessary for managing our website.

3.4 Financial transactions relating to our website and services may be handled by our payment services providers. We will share transaction data with our payment services providers only to the extent necessary for the purposes of processing your payments, refunding such payments and dealing with complaints and queries relating to such payments and refunds. You can find information about the payment services providers' privacy policies and practices by contacting us.

3.5 We may disclose your enquiry data to one or more of those selected third party suppliers of goods and services identified on our website for the purpose of enabling them to contact you so that they can offer, market and sell to you relevant goods and/or services. Each such third party will act as a data controller in relation to the enquiry data that we supply to it; and upon contacting you, each such third party will supply to you a copy of its own privacy policy, which will govern that third party's use of your personal data.

3.6 In addition to the specific disclosures of personal data set out in this Section 3, we may disclose your personal data where such disclosure is necessary for compliance with a legal obligation to which we are subject, or in order to protect your vital interests or the vital interests of another natural person. We may also disclose your personal data where such disclosure is necessary for the establishment, exercise or defence of legal claims, whether in court proceedings or in an administrative or out-of-court procedure.

4. Retaining and deleting personal data

4.1 This Section 4 sets out our data retention policies and procedure, which are designed to help ensure that we comply with our legal obligations in relation to the retention and deletion of personal data.

4.2 Personal data that we process for any purpose or purposes shall not be kept for longer than is necessary for that purpose or those purposes.

4.3 We will retain your personal data as follows:

(a) Account, personal, service and profile data will be retained for a minimum period of 120 days following initial communication and for a maximum period of 360 days following last communication.

4.4 In some cases it is not possible for us to specify in advance the periods for which your personal data will be retained. In such cases, we will determine the period of retention based on the following criteria:

(a) the period of retention of transaction and correspondence data will be determined based on your services with us.

4.5 Notwithstanding the other provisions of this Section 4, we may retain your personal data where such retention is necessary for compliance with a legal obligation to which we are subject, or in order to protect your vital interests or the vital interests of another natural person.

5. Amendments

5.1 We may update this policy from time to time by publishing a new version on our website.

5.2 You should check this page occasionally to ensure you are happy with any changes to this policy.

5.3 We may notify you of changes to this policy by email.

6. Your rights

6.1 You may instruct us to provide you with any personal information we hold about you; provision of such information will be subject to:

(a) no fee and

(b) the supply of appropriate evidence of your identity (for this purpose, we will usually accept a photocopy of your passport certified by a solicitor or bank plus an original copy of a utility bill showing your current address).

6.2 We may withhold personal information that you request to the extent permitted by law.

6.3 You may instruct us at any time not to process your personal information for marketing purposes.

6.4 In practice, you will usually either expressly agree in advance to our use of your personal information for marketing purposes, or we will provide you with an opportunity to opt out of the use of your personal information for marketing purposes.

7. About cookies

7.1 A cookie is a file containing an identifier (a string of letters and numbers) that is sent by a web server to a web browser and is stored by the browser. The identifier is then sent back to the server each time the browser requests a page from the server.

7.2 Cookies may be either “persistent” cookies or “session” cookies: a persistent cookie will be stored by a web browser and will remain valid until its set expiry date, unless deleted by the user before the expiry date; a session cookie, on the other hand, will expire at the end of the user session, when the web browser is closed.

7.3 Cookies do not typically contain any information that personally identifies a user, but personal information that we store about you may be linked to the information stored in and obtained from cookies.

8. Cookies that we use

8.1 We use cookies for the following purposes:

- (a) authentication – we use cookies to identify you when you visit our website and as you navigate our website;
- (b) status – we use cookies to help us to determine if you are logged into our website;
- (c) personalisation – we use cookies to store information about your preferences and to personalise the website for you;
- (d) security – we use cookies as an element of the security measures used to protect user accounts, including preventing fraudulent use of login credentials, and to protect our website and services generally;
- (e) advertising – we use cookies to help us to display advertisements that will be relevant to you;
- (f) analysis – we use cookies to help us to analyse the use and performance of our website and services and;
- (g) cookie consent – we use cookies.

9. Cookies used by our service providers

9.1 Our service providers use cookies and those cookies may be stored on your computer when you visit our website.

9.2 We use Google Analytics to analyse the use of our website. Google Analytics gathers information about website use by means of cookies. The information gathered relating to our website is used to create reports about the use of our website. Google’s privacy policy is available at: <https://www.google.com/policies/privacy>

9.3 We may publish Google AdSense interest-based advertisements on our website. These are tailored by Google to reflect your interests. To determine your interests, Google will track your behaviour on our website and on other websites across the web using cookies. You can view, delete or add interest categories associated with your browser by visiting: <https://adssettings.google.com>. You can also opt out of the AdSense partner network cookie using those settings or using the Network Advertising Initiative’s multi-cookie opt-out mechanism at: <http://optout.networkadvertising.org>. However, these opt-out mechanisms themselves use cookies,

and if you clear the cookies from your browser your opt-out will not be maintained. To ensure that an opt-out is maintained in respect of a particular browser, you may wish to consider using the Google browser plug-ins available at: <https://support.google.com/ads/answer/7395996>

10. Managing cookies

10.1 Most browsers allow you to refuse to accept cookies and to delete cookies. The methods for doing so vary from browser to browser, and from version to version. You can however obtain up-to-date information about blocking and deleting cookies via these links:

- (a) <https://support.google.com/chrome/answer/95647?hl=en> (Chrome);
- (b) <https://support.mozilla.org/en-US/kb/enable-and-disable-cookies-website-preferences> (Firefox);
- (c) <http://www.opera.com/help/tutorials/security/cookies/> (Opera);
- (d) <https://support.microsoft.com/en-gb/help/17442/windows-internet-explorer-delete-manage-cookies> (Internet Explorer);
- (e) <https://support.apple.com/kb/PH21411> (Safari); and
- (f) <https://privacy.microsoft.com/en-us/windows-10-microsoft-edge-and-privacy> (Edge).

10.2 Blocking all cookies will have a negative impact upon the usability of many websites.

10.3 If you block cookies, you will not be able to use all the features on our website.

11. Our details

11.1 This website is owned and operated by **Valorem Limited**.

11.2 We are registered in England and Wales under registration number is: **14687204**, and our registered office is at

Railview Lofts
19C Commercial Road
Eastbourne
Sussex
BN21 3XE

11.3 You can contact us:

- (a) [by post, to the postal address given above;
- (b) using our website contact form at the bottom of the page;
- (c) by telephone, on the contact number published on our website from time to time; or
- (d) by email, using the email address published on our website from time to time.

12. Data protection officer

12.1 Our data protection officer's contact details are: **Graham Pope**
at **grahampope@valorem.group**