



Privacy Policy

Banks Chartered Surveyors are committed to protecting and respecting the privacy of all our clients. This privacy notice, relates to all data collected throughout our business activities setting out the lawful bases on which we collect and process personal data, detailing your rights regarding personal data, in compliance with the EU General Data Protection Regulations (GDPR). Any information submitted by you will be used solely to provide the services that you have requested and for our own administrative purposes. Any information supplied will not be accessible to or supplied to any other user or to a third party unless required by law.

Who are Banks Chartered Surveyors?

Banks Chartered Surveyors is a sole trader offering a number of property and land related services as a chartered surveyors, valuer, planning consultant estate and land agents whose registered office is Bamfords Farm, Grange Lane, Hutton, Preston, PR4 5JE and who operate the website www.banks-surveyors.co.uk.

How do we collect information?

We collect information about you when we receive instructions to act on your behalf, you visit our website, sign up for property alerts via the website or enquire about the services we provide. This information is stored securely on our central database, individual client files or secure cloud backup.

What information is collected?

Banks Chartered Surveyors will only collect personal data or personal information required to fulfil their obligations to Clients or in response to business enquiries.

This data may include

- Name
- Trading name (if different)
- Address – personal/business
- Telephone numbers – landlines and mobiles
- Email address
- Solicitors/Accountants details
- Company or Trust documentation
- Other relevant information required to undertake the instruction
- Personal and residential verification required for Money Laundering purposes
- Bank account details for Management Clients and direct bank payments



- Qualifications & Insurance details for contracted resources

What is this information needed for?

- To contact you
- Undertake your instructions
- Complete Conflict of interest checks
- Comply with the Anti Money Laundering regulations
- Comply with professional organisations regulatory requirements
- Share with regulatory authorities when required by law
- Provide you with marketing information

Banks Chartered Surveyors do not gather any sensitive personal data and our services are not directed to children under the age of 13.

The legal bases for collecting personal data

Banks Chartered Surveyors hold personal data on one or more of the following legal bases as defined in Article 6 of the General Data Protection Regulations.

- Consent – you have given clear instructions for Banks Chartered Surveyors to control and process your personal data for a specific purpose
- Contract – by accepting our terms of business we have a contract for which your personal data is necessary to process and complete your instruction
- Legal obligation – legal or regulatory obligations
- Legitimate interest – you would expect personal data to be held with compelling justification and minimal privacy impact

Some of the above grounds for processing your personal data will overlap and there may be several grounds which justify our use of your personal information.

Access to the information

This information is available to the Director and employees of Banks Chartered Surveyors and will only be used as required to undertake the instructions for which the information was obtained.

Banks Chartered Surveyors will not sell, rent your personal data, or share it with third parties for marketing purposes, however, we may pass client information to third party service providers who have been engaged for the purpose of completing tasks and providing services on our behalf.

Only where there is a legal, financial or compliance requirement this information will be submitted to a third party and personal data will be processed by and on behalf of the



Company. We will require third parties to comply strictly with your instructions and data protection laws making sure that appropriate controls are in place.

We take reasonable technical measures to protect against unauthorised access, modification or misuse of the data we hold to carry out your instructions. Our systems are password protected, backed up with router firewalls compliant with best practice and ongoing staff training.

Retention Period

In the absence of any legal requirement, your personal data will be retained for as long as deemed necessary for the purpose of completing the instruction, undertaking conflict of interest checks or for legitimate purposes. Whilst you have the right to withdraw consent, for legal or legitimate purposes we are required to retain this information but will not use it for any other purpose. You need to inform Banks Chartered Surveyors if your personal data changes.

Data Storage and Security

Banks Chartered Surveyors are committed to protect all personal data stored on our in-house server secured and backed up by passwords, router firewalls, Mail Store, Crypto Safeguard and Backup Assist. All staff have received training on data protection procedures and accountability.

Banks Chartered Surveyors has a Data Protection Policy that includes a clear process for handling data breaches should one occur. Any data breaches discovered externally should be reported to Mr L Banks immediately.

You have the right to

- Update us and have any inaccuracies in your data corrected. If you would like to update the details we hold about you, please contact Mr L Banks
- Request a copy of the personal information we hold about you
- Submit your request in writing to Mr L Banks Managing Director, Bamfords Farm, Grange Lane, Hutton, Preston, PR4 5JE
- We will respond requesting you complete a pro forma that details the proof of identity requirements, the reasons and case details where you believe Banks Chartered Surveyors hold your personal data
- Request that we erase your personal data unless we have a legal obligation to retain the personal data
- Have the data we hold about you transferred to another organisation for legal or legitimate interests
- Object to certain types of processing such as direct marketing



- Object to automated processing, including profiling

Rights to object or Complain

Please contact us if you have any enquiries arising from this privacy notice. Where possible, please raise all enquiries in writing.

If you are unhappy with our handling of your data or something that we have done or failed to do, please inform us in writing. We will acknowledge receipt of all complaints and will endeavour to investigate the complaint as soon as reasonably practicable.

All complaints should be sent to:

Mr L Banks, Managing Director, Bamfords Farm, Grange Lane, Hutton, Preston, PR4 5JE

Tel: 07857 877925

Email: luke@banks-surveyors.co.uk

Website: www.banks-surveyors.co.uk

You may also complain directly to the Information Commissioner's Office if you are concerned with how we are handling your personal information. Their contact details are shown below:

Information Commissioner's Office, Wycliffe House, Water Lane, Wilmslow, Cheshire, SK9 5AF

Tel: 0303 123 1113 or 01625 545745, Website: www.ico.gov.uk

This Notice was last reviewed in March 2026. The content of the policy may be reviewed and changed without prior notice, please visit our website for any changes. We may update the terms of this privacy notice at any time, so please do check it from time to time.