

## Privacy Notice and Cookie Policy

### Pinnacle Surveyors (England and Wales) Ltd. – Last reviewed: June 2026

Pinnacle Surveyors (England and Wales) Ltd. takes the privacy and security of personal information seriously. This Privacy Notice explains how we collect, use, store, share and protect personal information when individuals use our website, contact us, instruct us, receive our services, or otherwise interact with us.

This notice is intended to meet the transparency requirements of the UK General Data Protection Regulation, the Data Protection Act 2018 and, where relevant to cookies, direct marketing and similar technologies, the Privacy and Electronic Communications Regulations 2003. It explains what personal information we collect, why we use it, the lawful bases we rely on, who we share it with, how long we keep it, and the rights available to individuals.

This notice should be read together with any service-specific information, terms of business, engagement letters or consent notices we provide. We review this notice regularly and will update it when our processing activities, legal obligations or regulatory guidance change.

#### 1. Who we are and how to contact us

Pinnacle Surveyors (England and Wales) Ltd. is the controller responsible for the personal information described in this notice unless we state otherwise. This means we decide why and how personal information is processed.

Our contact details are:

Pinnacle Surveyors (England and Wales) Ltd., Profile House, Stores Road, Derby, DE21 4BD.

Email: [enquiries@pinnaclesurveyors.co.uk](mailto:enquiries@pinnaclesurveyors.co.uk)

Our Data Protection Officer is Paula Henchcliff, Head of People and Operations. Data protection enquiries, rights requests and complaints should be sent to [paula@pinnaclesurveyors.co.uk](mailto:paula@pinnaclesurveyors.co.uk) or by post to the address above and marked for the attention of the Data Protection Officer.

#### 2. Personal information we collect

Depending on how individuals interact with us, we may collect and use the following categories of personal information:

- Identity and contact details, such as name, address, email address, telephone number, job title and organisation.
- Property, valuation, survey and instruction information needed to provide surveying services.
- Client, applicant, borrower, occupier, supplier and professional-contact information.
- Correspondence, call notes, enquiries, complaints, feedback and records of communications.
- Billing, payment and accounting information.
- Website and technical information, including IP address, device information, browser type, operating system, pages visited, date and time of visits, cookie identifiers and similar online identifiers.
- Marketing preferences and consent records.
- Information required for legal, regulatory, insurance, audit, quality-control, fraud-prevention and professional-indemnity purposes.
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### 3. How we collect personal information

We collect personal information directly from individuals when they contact us, complete forms, instruct us, use our website, subscribe to communications, make payments, or otherwise provide information to us. We may also receive personal information from lenders, panel managers, estate agents, solicitors, brokers, insurers, professional advisers, public registers, suppliers, service providers, fraud-prevention bodies, regulatory bodies and other parties involved in a property, valuation or surveying instruction.

### 4. Why we use personal information and our lawful bases

We only use personal information where we have a lawful basis to do so. The main purposes and lawful bases are set out below.

Purpose	Personal information used	Lawful basis
Responding to enquiries and providing quotations	Contact details, enquiry details, property information and correspondence	Legitimate interests and, where steps are taken before a contract, contract
Providing surveying, valuation and related services	Identity, contact, property, instruction, access, occupier and professional-contact information	Contract, legitimate interests and legal obligation where applicable
Managing client relationships, quality control and complaints	Contact details, service records, communications, feedback and complaint information	Legitimate interests, contract and legal obligation
Billing, accounting and debt management	Contact details, transaction records, invoices and payment information	Contract, legal obligation and legitimate interests
Meeting legal, regulatory, insurance and professional obligations	Service records, correspondence, identity, property and instruction information	Legal obligation and legitimate interests
Website operation, security and fraud prevention	Technical information, IP address, device data, logs and security records	Legitimate interests and legal obligation where applicable
Sending marketing or service updates	Contact details, marketing preferences, consent records and engagement information	Consent where required and legitimate interests where permitted by law

Where we rely on legitimate interests, those interests include operating and improving our services, managing client and professional relationships, maintaining records, protecting our business, preventing misuse or fraud, ensuring website and information security, and pursuing or defending legal claims. We consider and balance any potential impact on individuals before relying on this basis.

### 5. Special category and criminal offence information

We do not usually need special category information, such as health information, or criminal offence information. If such information is provided to us or becomes relevant to a specific instruction, complaint, access need, legal claim or safeguarding matter, we will only use it where a valid lawful basis and additional condition under data protection law applies.

## **6. Cookies and similar technologies**

Our website may use cookies, pixels, tags, scripts, local storage or similar technologies. These technologies may store information on, or access information from, a visitor's device. We use them to operate the website, maintain security, remember preferences, understand website use and, where applicable, support marketing or analytics.

Strictly necessary cookies and technologies are used where they are essential to provide a service requested by the user, such as website security, page navigation, form submission or load balancing. We may use these without consent.

For non-essential cookies or similar technologies, such as advertising, social media, tracking pixels or analytics that do not fall within a permitted exception, we will request consent before setting them. Individuals should be able to accept, reject or change non-essential cookie choices using the cookie controls made available on the website.

If a technology is used for more than one purpose, we will assess each purpose and apply the appropriate consent or objection mechanism. We will keep our cookie information under review and update it when technologies or legal requirements change.

## **7. Who we share personal information with**

We may share personal information where necessary with clients, lenders, panel managers, applicants, property owners or occupiers, estate agents, solicitors, brokers, insurers, professional advisers, regulators, public authorities, fraud-prevention bodies, IT, hosting, software, payment, accounting, marketing and communication service providers, and other suppliers who support our services. We require service providers acting as processors to process personal information only on our instructions and to apply appropriate security measures.

We may also share information where required by law, court order, regulation, professional obligation, insurance requirement, or where necessary to establish, exercise or defend legal claims.

Where personal information is transferred or made accessible outside the UK, we will ensure that an appropriate transfer mechanism is in place, such as UK adequacy regulations, the UK International Data Transfer Agreement, the UK Addendum to EU Standard Contractual Clauses, or another permitted safeguard or exception. We will assess restricted transfers in line with current ICO guidance.

## **8. How long we keep personal information**

We keep personal information only for as long as necessary for the purposes for which it was collected, including to provide services, manage enquiries, meet legal, regulatory, tax, accounting, insurance and professional obligations, resolve disputes, handle complaints and establish, exercise or defend legal claims.

Retention periods vary depending on the type of information, the service provided, limitation periods, professional requirements and our legal obligations. When personal information is no longer required, we will delete it, anonymise it, or securely archive it with restricted access where appropriate.

## **9. Security**

We use appropriate technical and organisational measures to protect personal information against unauthorised access, accidental loss, destruction, alteration or disclosure. Measures may include access controls, secure systems, staff guidance, supplier due diligence, encryption where appropriate, backups, incident management and review of security arrangements. No internet-based transmission or storage system can be guaranteed to be completely secure.

## 10. Marketing communications

We may send marketing communications where permitted by law. This may be because an individual has consented, or because we are relying on the soft opt-in or legitimate interests where this is permitted. We will not send electronic marketing that requires consent unless valid consent has been obtained.

Individuals can opt out of marketing at any time by using any unsubscribe link provided or by contacting us at [enquiries@pinnaclesurveyors.co.uk](mailto:enquiries@pinnaclesurveyors.co.uk). Opting out of marketing will not stop necessary service, contractual or legal communications.

## 11. Individual rights

Individuals have rights under data protection law, subject to conditions and exemptions. These may include the right to:

- be informed about how personal information is used;
- access personal information and receive a copy;
- ask us to correct inaccurate or incomplete information;
- ask us to erase personal information in certain circumstances;
- ask us to restrict processing in certain circumstances;
- object to processing based on legitimate interests or direct marketing;
- receive personal information in a portable format where the right applies;
- withdraw consent where processing is based on consent; and
- not be subject to certain decisions based solely on automated processing that have legal or similarly significant effects.

Requests should be sent to Paula Henchcliff, Head of People and Operations, at [paula@pinnaclesurveyors.co.uk](mailto:paula@pinnaclesurveyors.co.uk). We may need to verify identity before responding. We will respond within the period required by law, although this may be extended where a request is complex or numerous, as permitted by data protection law.

If a request is unclear, we may ask for further information to help us locate the relevant personal information or understand the request.

There is usually no fee for exercising rights, but we may charge a reasonable fee or refuse a request where the law allows, for example if a request is manifestly unfounded or excessive.

## 12. Collection of general data and information

When individuals access our website, our systems may automatically collect general technical information. This may include the browser type and version, operating system, referring website, pages visited, date and time of access, internet protocol address, internet service provider, device identifiers and similar information.

We use this information to deliver website content correctly, maintain website functionality, monitor performance, improve user experience, protect the security and integrity of our systems, investigate

technical issues, prevent misuse or fraud, and produce aggregated statistical information about website use.

Where this information identifies, or could reasonably identify, an individual, we treat it as personal information and process it in accordance with this notice. Our lawful basis is our legitimate interests in operating, securing and improving our website and services, and legal obligation where processing is necessary to meet applicable legal or regulatory requirements.

### **13. Complaints**

Individuals can complain to us about how we handle personal information by contacting Paula Henchcliff, Head of People and Operations, at [paula@pinnaclesurveyors.co.uk](mailto:paula@pinnaclesurveyors.co.uk) and marking the message as a data protection complaint. We will acknowledge complaints, investigate them, and provide a response in line with our complaints procedure and applicable legal requirements.

Individuals also have the right to complain to the Information Commissioner's Office, the UK supervisory authority for data protection. The ICO can be contacted through its website or by telephone on 0303 123 1113.

### **14. Automated decision-making and profiling**

We do not make decisions about individuals based solely on automated processing that produce legal or similarly significant effects. If this changes, we will update this notice and provide meaningful information about the logic involved, the significance and the expected consequences of the processing.

### **15. Children's personal information**

Our services are not directed at children. We do not knowingly collect children's personal information through our website for marketing purposes. If children's information is provided as part of a property, legal, safeguarding or service-related matter, we will process it only where lawful and necessary.

### **16. Changes to this notice**

We may update this Privacy Notice and Cookie Policy from time to time. The latest version will be published on our website or made available on request. If we make material changes, we will take reasonable steps to bring those changes to the attention of affected individuals where required.