

Purpose/Activity	Type of data	Lawful basis for processing including basis of legitimate interest
To register you as a new client.	1. Identity. 2. Contact.	Performance of a contract with you.
To deliver services to you, including: 1. Providing you and/or our clients with our advice. 2. Managing payments, fees and charges. 3. Collecting and recovering money owed to us and/or our clients.	1. Identity. 2. Contact. 3. Financial. 4. Transaction. 5. Marketing and communications.	1. Performance of a contract with you. 2. Necessary for our legitimate interests (to recover debts due to us and/or our clients).
To deal with your application for employment with us.	1. Identity. 2. Contact.	Necessary for our legitimate interests (to administer our recruitment process).
To manage our relationship with you which will include: 1. Notifying you about changes to our terms or privacy policy. 2. Asking you to leave a review or take a survey.	1. Identity. 2. Contact. 3. Profile. 4. Marketing and communications.	1. Performance of a contract with you. 2. Necessary to comply with a legal obligation. 3. Necessary for our legitimate interests (to keep our records updated and to study if our clients are happy with our services).
To administer and protect our business and this website (including troubleshooting, data analysis, testing, system maintenance, support, reporting and hosting of data).	1. Identity. 2. Contact. 3. Technical.	1. Necessary for our legitimate interests (for running our business, provision of administration and IT services, network security, to prevent fraud and in the context of a business reorganisation or group restructuring exercise). 2. Necessary to comply with a legal obligation.
1. To protect and secure our buildings/assets and the well-being of staff, clients, and visitors. 2. For training and monitoring purposes.	1. Identity 2. Contact 3. Financial 4. Transaction 5. Recorded	1. Necessary for our legitimate business interests (to protect our business) 2. Necessary for our legitimate business interests (to provide you and/or our clients with our advice) 3. Necessary to comply with a legal obligation
To use data analytics to improve our website, products/services, marketing, customer relationships and experiences.	1. Technical. 2. 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).
To make suggestions and recommendations to you about services that may be of interest to you.	1. Identity. 2. Contact. 3. Technical. 4. Usage. 5. Profile.	Necessary for our legitimate interests (to develop our services and grow our business).

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To operate/administer a prize draw or competition that you respond to or participate in	1. Identity. 2. Contact. 3. Technical. 4. Profile. 5. Usage. 6. Marketing and communications.	1. Performance of a contract with you (formed under acceptance of any of our prize draw or competition terms and conditions, or through any other basis). 2. Necessary for our legitimate business interests (to develop our services and to grow our business).