

Sodbury Property Consultancy Limited

Company Registration No. 13594720

1. About this Privacy Policy

Sodbury Property Consultancy Limited, trading as Sodbury Home Surveys ("Sodbury", "we", "us" or "our"), takes the privacy and security of personal information seriously.

This Privacy Policy explains what personal information we collect, where we obtain it from, why we use it, who we may share it with, how and where it is stored, how long we normally keep it and the rights you have in relation to it.

Sodbury Property Consultancy Limited is the **data controller** for personal information processed in connection with our surveying, property consultancy and associated business activities.

Our contact details are:

Registered Office:

40 St James Buildings

St. James Street

Taunton

England

TA1 1JR

Email: info@sodbury-property.co.uk

For any queries, requests or complaints concerning personal information, please contact us using the details above and mark your communication for the attention of our **Privacy Contact**.

We process personal information in accordance with applicable UK data protection legislation, including the UK General Data Protection Regulation ("UK GDPR"), the Data Protection Act 2018 and the Data (Use and Access) Act 2025.

Where electronic marketing or cookies and similar technologies are involved, we will also comply with the Privacy and Electronic Communications Regulations 2003 ("PECR") where applicable.

2. The personal information we collect

The information we collect depends upon your relationship with us, the nature of your enquiry and the services you instruct us to provide.

Identity and contact information: We may collect your name, current address, telephone number, email address and information about other people involved in the transaction or instruction.

We may also record whether you are acting personally or on behalf of somebody else, and how you first became aware of or were referred to our services.

Property and transaction information: We may collect information concerning the property and transaction, including:

- the property address;
- links to estate agent, Rightmove, Zoopla or similar property listings;
- property type and accommodation;
- the agreed or proposed purchase price;
- whether the property is occupied or vacant;
- tenure information;
- approximate age and construction;
- extensions, alterations and previous building works;
- information concerning boundaries;
- listed-building or conservation-area status;
- known or suspected defects;
- matters you particularly want us to investigate;
- the identities of relevant vendors, occupiers, agents, solicitors or other parties; and
- other information reasonably relevant to the property or transaction.

Some information provided to us may subsequently be confirmed, supplemented or corrected through our own inspection and research.

Service and contractual information: We may collect and retain information concerning:

- the service or survey level you have requested;
- quotations and agreed fees;
- your acceptance of our Fee Quotation and Terms of Business;
- instructions or requests you give us;
- correspondence and other communications with you;
- dates and details of appointments and inspections;
- reports and other professional outputs; and
- records concerning administration of the instruction.

Financial and payment information: We may hold financial or transaction-related information including:

- quoted and agreed fees;
- invoices;
- records of payments received or outstanding;
- payment or transaction references;
- the agreed property purchase price; and
- broad information about repair or maintenance budgets where you choose to provide it.

We will only collect payment information which is reasonably required for administering our business and the services provided.

Information used to tailor our advice: We may invite you to provide optional information about your circumstances and priorities so that our professional advice can be made more relevant and useful to you.

This may include information concerning:

- whether the property will be your home, an investment or used for another purpose;
- whether you consider the purchase to be short-, medium- or long-term;
- alterations or extensions you may be considering;
- your experience of property maintenance and dealing with contractors;
- your broad ability or appetite to fund immediate, short-term or longer-term repair and maintenance work; and
- your attitude towards property-related risk and uncertainty.

We use this information to help put our observations, recommendations and identified risks into an appropriate context.

We do not use this information to provide financial advice, assess creditworthiness or make lending decisions.

Health, safety and access information: Before an inspection we may request information necessary to identify potential risks to our surveyors and other people involved in carrying out our work.

This may include information concerning:

- dangerous or unstable structures;
- suspected asbestos or other hazardous materials;
- rodents, vermin or potentially harmful animals or plants;
- traps, chemicals or pest-control measures;
- drainage installations or other site hazards;
- access restrictions; and
- circumstances requiring particular health, safety or infection-control precautions.

We do not normally require detailed medical information or medical histories.

However, information supplied to us may occasionally disclose information concerning a person's health. Health information receives additional protection under data protection law and will only be processed where there is an appropriate lawful basis and additional legal condition permitting us to do so.

We will seek to minimise the amount of health-related information collected and retained.

Conflicts of interest and regulatory information: As an RICS-regulated firm, we are required to identify and appropriately manage actual or potential conflicts of interest.

We may therefore collect information including:

- the identities of vendors and other relevant parties;
- whether you have a personal or family relationship with somebody working for us;
- whether we have previously acted for another party involved in the transaction; and
- details of other circumstances which could reasonably create, or appear to create, a conflict of interest.

Information about other people: Our professional work frequently involves information about people who are not our client.

This may include vendors, occupiers, estate agents, solicitors and conveyancers, managing agents, landlords, freeholders, family members, partners, contractors and other professional advisers.

If you provide personal information about somebody else, you should only provide information which is reasonably relevant to our services and which you are entitled to provide to us.

Technical, website and usage information: When you visit or interact with our website, our website systems and service providers may process technical or usage information.

Depending upon the systems being used, this may include:

- IP address;
- browser and device information;
- approximate location derived from technical information;
- pages visited;
- dates and times of visits;
- referral source;
- interactions with forms or website features; and
- information concerning how visitors navigate and use the website.

Further information concerning cookies and similar technology is provided later in this policy and, where appropriate, through information displayed on our website.

Marketing and communications information: We may maintain information concerning:

- your preferences regarding marketing communications;
- whether you have opted out of marketing;
- your previous enquiries or instructions;
- services you have previously purchased or expressed an interest in;
- feedback you provide;
- how you heard about us; and
- where relevant, your interactions with communications sent by us.

We will not use health and safety information or other special-category personal data for general marketing purposes.

3. Information created during our work

We create further information while providing our services. Depending upon the instruction, this may include:

- inspection notes;
- measurements;
- photographs;
- videos;
- drone imagery;
- research records;
- working documents;
- draft reports;
- final reports;
- correspondence;
- calculations;
- professional observations and opinions; and
- records of decisions or recommendations made during the instruction.

Photographs or other records taken at an occupied property may occasionally include personal possessions or other information from which an individual could potentially be identified.

We will seek to record only information which is reasonably relevant to our professional work.

4. How we collect personal information

We use several methods to obtain information.

Information you provide directly: Most personal information is provided by you through enquiries, telephone calls, emails, our customer information forms and questionnaires, documents or photographs you provide, conversations with us and communications during our instruction.

Information obtained from other people: We may obtain information relevant to our instruction from estate agents, solicitors and conveyancers, vendors, occupiers, managing agents, landlords or freeholders, contractors, other surveyors or professional advisers, and representatives acting on your behalf.

Where appropriate, we may contact these parties to obtain information reasonably required for our services.

Publicly available information: Our surveying services normally include desktop research concerning the property and surrounding area.

We may therefore obtain information from sources including:

- property marketing websites;
- statutory and public registers;
- planning and building-related records;
- Energy Performance Certificate information;
- mapping and aerial imagery;
- environmental, flooding and geological information;
- historic property information; and
- other publicly accessible property or locality information.

Relevant information obtained from these sources may form part of our professional file.

Information obtained from third parties or public sources may not always be complete or accurate and we will use reasonable professional judgement when deciding whether and how to rely upon it.

Information collected through our website and technology: Certain technical information may be collected automatically when you use our website or electronic services, including through server logs, cookies or similar technologies where applicable.

5. How and why we use personal information

We will only use personal information where we have a lawful reason to do so and for purposes which are reasonably compatible with the reason for which the information was collected.

Our principal processing activities are as follows:

Purpose	Principal lawful basis
Responding to enquiries and preparing quotations	Taking steps towards entering into a contract and our legitimate interests in operating our business
Registering and administering a new customer or instruction	Taking steps towards and performing our contract
Checking for conflicts of interest	Our legitimate interests and professional/regulatory obligations
Arranging inspections	Performance of our contract
Obtaining relevant information from estate agents, solicitors and other parties	Performance of our contract and our legitimate interests in efficiently providing professional services
Carrying out property and locality research	Performance of our contract and our legitimate interests in providing properly researched professional advice

Purpose	Principal lawful basis
Carrying out inspections and preparing reports and professional advice	Performance of our contract
Tailoring professional advice to your stated circumstances and priorities	Performance of our contract and our legitimate interests in providing useful and relevant advice
Managing health, safety and inspection risks	Our legitimate interests in protecting our surveyors, clients, occupiers and others and compliance with applicable legal obligations
Administration, invoicing, accounting and record keeping	Performance of our contract and compliance with legal obligations
Maintaining professional records	Our legitimate interests, professional obligations and the establishment, exercise or defence of legal claims
Quality assurance and reviewing our work	Our legitimate interests in maintaining and improving professional standards
Investigating complaints and claims	Our legitimate interests, professional obligations and the establishment, exercise or defence of legal claims
RICS monitoring, inspection or audit	Compliance with professional and regulatory obligations
Improving our website, forms, reports, communications and customer experience	Our legitimate interests in improving our business and services
Developing, testing and improving products or services	Our legitimate interests in developing our business and responding to customer needs
Understanding customer needs and analysing feedback, enquiries and service use	Our legitimate interests in improving our services and customer relationships
Customer relationship management	Our legitimate interests in maintaining effective relationships with existing and prospective customers
Internal research, analysis and business planning	Our legitimate interests in understanding and developing our business
Measuring the effectiveness of marketing and business-development activities	Our legitimate interests, subject to applicable data protection and electronic-marketing requirements
Recommending our own products or services which may reasonably be relevant to you	Consent or legitimate interests where permitted by law and subject to applicable marketing requirements
Direct marketing	Consent or legitimate interests where permitted by law, subject to PECR and your right to object
Appropriate use of Artificial Intelligence and other technology	The lawful basis applying to the underlying activity, subject to the additional safeguards set out in this policy

Where special-category personal information is involved, such as health information, an additional legal condition must also apply before it is processed.

6. Improving our business, services and customer experience

We may use information concerning enquiries, instructions, completed services, communications, feedback and interactions with us to understand our customers and improve the way we operate.

This may include using information to:

- identify common customer questions, concerns and service requirements;
- improve the content, structure and usability of our reports, forms, website and communications;
- develop or improve existing and new surveying, property-related or associated products and services;
- review customer feedback and identify opportunities to improve service quality;
- understand broader customer needs and preferences;
- improve how we communicate with and support customers;
- analyse trends in enquiries and instructions;
- measure the effectiveness of our marketing and business-development activities; and
- carry out internal research, planning and service development.

Where reasonably practicable, we will use aggregated, statistical or anonymised information for these activities.

Where identifiable personal information is used, we will limit its use to information reasonably necessary and proportionate to the purpose.

Information provided by customers about their property priorities, experience, preferences, budget or risk appetite may be analysed to help us understand broader customer needs and improve the design and delivery of our services. Wherever reasonably practicable, this analysis will be undertaken on an aggregated or anonymised basis.

We will not use health-related information collected for inspection safety, or other special-category personal information, for general marketing, customer profiling or business-development purposes.

7. If you do not provide information

Some information is required for us to enter into or perform our contract with you, comply with professional obligations or safely carry out an inspection.

Where information is necessary and you do not provide it, we may not be able to accept your instruction, arrange an inspection or provide some or all of the requested services.

Where information is optional, this will not normally prevent us from providing the core service.

8. Our use of Artificial Intelligence

We may use approved Artificial Intelligence ("AI") systems to assist with selected aspects of our professional and administrative work where we consider their use appropriate and proportionate.

This may include assisting with:

- property or technical research;
- reviewing documents;
- extracting or organising information;
- summarising information;
- preparing or refining draft wording;
- report preparation;
- quality assurance;
- analysing business information; and
- improving appropriate internal processes or services.

Professional responsibility: AI is used as a tool to assist our work. It does not replace the professional judgement of our surveyors. Where AI has a material impact on the delivery of our surveying services, appropriate professional oversight will be retained. Responsibility for professional advice, observations, opinions, recommendations and conclusions provided by us remains with Sodbury Property Consultancy Limited notwithstanding the use of AI in their preparation.

Privacy and confidentiality: We recognise that the use of AI can create additional privacy and confidentiality risks. We will therefore seek to minimise the information supplied to AI systems and, where reasonably practicable, anonymise, pseudonymise or remove information identifying individuals before information is processed by an AI system. We will not upload private or confidential client information to an AI system where doing so would create an unacceptable risk. Where applicable RICS professional requirements require express written consent before private or confidential information is uploaded to an AI system, that consent will be obtained in advance.

Before approving an AI system for material professional use, we will take reasonable steps to consider issues including:

- confidentiality;

- data protection;
- the provider's handling and use of submitted information;
- whether submitted information may be used to train or improve the provider's systems;
- cybersecurity;
- retention;
- reliability;
- known limitations;
- professional risk; and
- available contractual and technical safeguards.

Human review and automated decision-making: We do not use AI to make solely automated decisions about clients which have legal or similarly significant effects without meaningful human involvement. Material AI-generated information used in our professional work remains subject to appropriate professional review.

Further information and opting out: Further information about our use of AI in relation to an instruction, including the nature of its use, relevant limitations and safeguards, is available on request. Our Terms of Business also explain our professional use of AI and the circumstances in which you may opt out.

If you wish to discuss, contest or object to the use of AI in connection with your instruction, please contact:

info@sodbury-property.co.uk

9. Who we share personal information with

We do **not sell personal information**.

Information may be disclosed where reasonably necessary to provide our services, operate our business, meet professional obligations or comply with the law.

Parties involved in the property transaction: Where appropriate, and subject to our duties of confidentiality, we may communicate with your estate agent, solicitor or conveyancer, vendors or occupiers, managing agents, contractors, other professional advisers or another person you have authorised us to deal with. We will not ordinarily provide our survey report or professional advice to another person for them to rely upon unless separately agreed.

Technology and service providers: We use third-party technology to operate our business. This includes **Microsoft**, including Microsoft OneDrive and Microsoft 365, for cloud file storage, email, office software and associated business systems.

We may also use appropriate providers of:

- online forms;
- accounting or payment services;
- IT support;
- cybersecurity;
- backup services;
- communications;
- website hosting and analytics;
- document processing; and
- approved AI systems.

Where another organisation processes personal information on our behalf, we will take reasonable steps to ensure appropriate confidentiality, security and data-protection arrangements are in place.

Professional advisers, insurers and regulators: Information may also be disclosed where appropriate to RICS, our professional indemnity insurers and insurance advisers, accountants, solicitors and other legal advisers, complaints-handling or alternative dispute-resolution organisations, courts and tribunals, law-enforcement bodies and other regulators or public authorities. As an RICS-regulated firm, our professional files may be inspected or audited by RICS and information contained within our files may therefore be disclosed to RICS where required.

10. International transfers

Some technology providers we use, including cloud and AI service providers, may process information using infrastructure located outside the United Kingdom.

Where personal information is transferred internationally, we will take reasonable steps to ensure the transfer is lawful and appropriate safeguards required by UK data protection law are in place.

Depending upon the provider and destination, these safeguards may include UK adequacy regulations, approved contractual safeguards, the UK International Data Transfer Agreement, the UK Addendum to approved contractual clauses or another mechanism permitted by UK data protection law.

Further information about safeguards applying to a particular provider is available on request.

11. Where and how we store information

Active instructions: Files relating to active jobs are primarily stored electronically using **Microsoft OneDrive**, together with associated Microsoft business systems. This enables authorised users to access information required to provide our services while maintaining appropriate account and access controls.

Archived instructions: Once an instruction has been completed and the professional file is archived, records are ordinarily transferred from our active working-file system to **external digital hard drives** used for long-term archive storage. These archive drives are normally kept **offline and disconnected from computers or the internet when not required for legitimate business purposes**. Keeping archived records offline for most of their life reduces exposure to internet-based security threats. Access to archived files is limited to circumstances where there is a legitimate business, professional, regulatory or legal reason to retrieve them.

Security measures: Depending upon the system and information concerned, our safeguards may include password protection, account access controls, multi-factor authentication, device security, secure cloud services, appropriate access restrictions, offline archive storage, backup arrangements and security measures supplied by our technology providers.

No electronic storage system can be guaranteed completely secure. If we become aware of a personal data breach, we will investigate it and comply with applicable requirements concerning notification to affected individuals and/or the Information Commissioner's Office.

12. How long we keep information

We retain personal information only for as long as we reasonably consider necessary having regard to:

- the purpose for which it was collected;
- professional and regulatory obligations;
- professional indemnity insurance arrangements;
- applicable limitation periods;
- accounting and taxation requirements;
- the possibility of complaints or professional negligence claims; and
- other legal or regulatory requirements.

Professional surveying files: Core professional records relating to a completed surveying instruction will normally be retained for **up to 15 years following completion of our services**. These may include the report, inspection records, photographs and other imagery, research, relevant instructions, contractual records, correspondence and other information forming part of the professional file. This period allows us to retain an appropriate record of the professional services provided and respond to questions, complaints, regulatory enquiries or potential legal claims which may arise after completion.

Enquiries which do not proceed: Information relating solely to enquiries or quotations which do not result in an instruction may be retained for a shorter period where there is no continuing business, professional or legal reason to retain it.

Accounting records: Accounting and taxation records will be retained for the period required by applicable law.

Marketing preferences: Where you ask us not to send marketing communications, we may retain limited information recording that preference so that we can respect your request in the future.

Complaints and claims: Information may be retained longer where a complaint, dispute, investigation or legal claim is ongoing or reasonably anticipated.

When information no longer needs to be retained, it will be securely deleted, destroyed or anonymised as appropriate.

13. Website analytics, cookies and similar technologies

We may collect statistical information concerning how visitors use our website so that we can understand its use and improve its content, functionality and usability.

Depending upon the systems being used, this may include information concerning pages visited, visitor numbers, time spent on pages, device or browser type, referral sources and general user journeys.

Where website storage or access technologies are used solely for statistical purposes and an applicable statutory exemption applies, they will be operated subject to the conditions of that exemption, including appropriate information and an ability to object where required.

Where cookies or similar technologies are used for advertising, behavioural tracking, remarketing, profiling or another purpose requiring consent, consent will be obtained where required by law.

More detailed information about particular cookies or similar technologies may be provided through our website or a separate cookie notice.

14. Marketing and customer communications

We may occasionally contact existing or prospective customers about our own services where permitted by law.

We may use limited information concerning previous enquiries, instructions, interests or customer relationships to determine whether one of our services may reasonably be relevant to you.

We will not use health and safety information, special-category personal data or detailed information about your personal finances for marketing profiling.

Where consent is legally required before electronic marketing is sent, we will obtain that consent.

Where the law permits us to contact an existing customer without separate consent, we will only do so in accordance with applicable requirements.

We do not sell customer details to third-party marketing organisations.

You have the right to object to direct marketing at any time.

You can unsubscribe using the facility included within an electronic marketing message or contact us at:

info@sodbury-property.co.uk

Objecting to marketing will not prevent us sending communications necessary to administer or provide services you have instructed us to carry out.

15. Using information for a new purpose

We will normally only use personal information for the purposes for which it was collected or another purpose which is reasonably compatible with the original purpose.

If we need to use identifiable personal information for a materially different and incompatible purpose, we will consider whether a new lawful basis is available and provide additional privacy information where required before undertaking that processing.

16. Your data protection rights

Depending upon the circumstances and the lawful basis on which information is processed, you may have rights including:

- the **right to be informed** about how your personal information is used;
- the **right of access** to personal information held about you;
- the **right to rectification** of inaccurate or incomplete information;
- the **right to erasure** in certain circumstances;
- the **right to restrict processing** in certain circumstances;
- the **right to data portability** where applicable;
- the **right to object** to certain processing, including direct marketing; and
- rights relating to certain forms of **automated decision-making**.

Where processing is based upon consent, you also have the right to withdraw that consent.

These rights are not absolute. For example, we may sometimes need to retain information despite a request for deletion where it is necessary to comply with a legal or regulatory obligation or for the establishment, exercise or defence of legal claims. Requests concerning your personal information can be made using the contact details at the beginning of this policy. We will not normally charge a fee for dealing with a data-protection request. A reasonable fee may only be charged, or a request refused, where permitted by law.

17. Data protection complaints

If you are concerned about the way we have collected, used, stored or shared personal information, you are encouraged to contact us in the first instance.

A data protection complaint may be made by email, telephone, post or another reasonable means. We will not require you to use a particular form or method in order for us to consider your complaint.

Please contact:

Sodbury Property Consultancy Limited

40 St James Buildings

St. James Street

Taunton

England

TA1 1JR

Email: info@sodbury-property.co.uk

We will acknowledge receipt of a data protection complaint within **30 calendar days** of receiving it.

We will investigate the matter appropriately, keep you informed where necessary and notify you of the outcome as soon as reasonably possible.

You also have the right to complain to the **Information Commissioner's Office (ICO)**, the UK's independent data-protection regulator.

The ICO can be contacted through its website at ico.org.uk or by telephone on **0303 123 1113**.

18. Changes to this Privacy Policy

We may update this Privacy Policy from time to time to reflect changes in our business, services, information-handling practices, technology, professional requirements or applicable law and regulation.

The current version will be made available through our website or on request.

Where a change materially affects the way we use existing personal information, we will take reasonable steps to bring the change to the attention of affected individuals where appropriate.

Last updated: 20 August 2026