

Privacy Policy Client

Who are we?

Age UK Surrey (AUKS) is committed to protecting and respecting your privacy and security. Whenever you provide us with your personal information, we will treat that information in accordance with this policy and current UK Data Protection legislation.

Please read the following carefully to understand our views and practices regarding your personal data and how we will treat it.

AUKS is a registered charity number 1036450 and company limited by guarantee number 2803315. Our registered address is The Clockhouse Community Centre, Chapel Lane, Milford, Surrey, GU8 5EZ.

If you have any questions around this Privacy Policy, you should contact us on 01483 503414 or enquiries@ageuksurrey.org.uk or data.privacy@ageuksurrey.org.uk.

How do we collect information from you?

Information is collected at face-to-face meetings, over the telephone or via email when enquiring or referring you to a service or while delivering a service, at events or outreach sessions when making an enquiry or referral or when you donate to our charity.

Information is also collected when you complete forms on our website or contact us online.

What type of information is collected from you?

Age UK Surrey collects information (name, address, telephone number, email address) to respond to your enquiries and provide services. We only collect the information necessary for the specific service you are using.

Online information may additionally collect IP address and information regarding which pages of our website have been viewed and when.

How is your information used?

Age UK Surrey may use your information to identify the service provision required and ensure accurate records are maintained for follow up. Information is held on a secure database and any signed paperwork is stored electronically or in a secure cabinet or briefcase.

If you have used AUKS services, basic demographic and service information may be shared with Age UK the national charity so they can help with monitoring and ultimately improving the services provided. The information shared will not include your name or your contact details, unless you give consent to do so for a specific purpose, such as sharing your story or for an advice audit.

Who has access to your information?

AUKS does not sell or rent your information to third parties.

AUKS does not share your information with third parties for marketing purposes.

AUKS may share your information with trusted third parties to provide a service (e.g. when you make a donation or apply for a grant or apply for Household Support Fund and specifically for a third-party agent to top up any client energy meters), but data shared will be limited to the

minimum personal information necessary to deliver the service.

Where you sign up to a service (such as gardening or home help), AUKS will share relevant information (e.g. your name, address, and service requirements) with the assigned worker so they can deliver the service.

If you request a welfare benefit check we may share limited details with Age UK national charity and their trusted benefits calculation partner. We will only share personal information necessary to deliver the benefits advice.

Lawful Processing

Data protection law requires Age UK Surrey to have a valid legal basis to use your personal information. Depending on the following Age UK Surrey relies on the following legal basis:

Specific consent: Where you have provided specific consent to using your personal information in a certain way (for example for receiving marketing events and fundraising information or receiving welfare benefits or housing advice or using your image or naming you in your story).

Performance of a contract: Where you agree to receive a service and we use your personal information to provide and manage the service eg. Home Help, Gardening Services or support with Lasting Power of Attorney (LPA) forms.

Legal obligation: Where necessary to comply with the law or regulatory authority requirements eg. Charity Commission or Fundraising Regulator.

Vital interests: Where it is necessary to protect your life or health for example, in the case of medical emergencies or a safeguarding situation.

Legitimate interests:

In limited circumstances, where it is necessary for Age UK Surrey to operate effectively as a charity and such processing does not override your rights and freedoms.

When AUKS legitimately processes your personal information in this way it considers and balances any potential impact on you (both positive and negative) and your rights under data protection laws. AUKS will not use your personal information where its interests are overridden by the impact on you, for example, where use would be excessively intrusive (unless, for instance, it is otherwise required or permitted to by law).

When it uses special category personal information, it requires an additional legal basis to do so under data protection laws. It will either do so based on your explicit consent or another route available to it at law (for example, if it needs to process it for employment, social security or social protection purposes, your vital interests or, in some cases, if it is in the public interest for it to do so).

Fundraising and Marketing

AUKS will ask for your consent to send you information about its services, news, events and fundraising initiatives.

AUKS will thank you for and acknowledge receipt of donations (if it has your contact details). It may send you a Gift Aid form to complete so that it can claim the tax back on your donation.

No stories, photographs or images will be used without your specific consent.

Planning for your future

As part of the Surrey County Councils funding of the Planning for your Future initiative, we will obtain your name and contact details to contact you about the various events and initiatives that are taking place. With your agreement we may also collect additional information about you and your circumstances via our surveys. This is at an anonymised level to enable us to understand better those matters affecting the planning of future care need, the cost of social care needs and the connecting people to local support. Aggregate data from these surveys including event feedback is then shared with Surrey County Council at an anonymised level.

Your choices

You have the right to opt out of receiving marketing communications from AUKS at any time or change the way it contacts you by calling us on 01483 503414 or enquiries@ageuksurrey.org.uk.

Your rights

Under the UK GDPR and the Data Protection Act 2018 – DPA 18 you have the following rights:

- The right to be informed
- The right of access
- The right to rectification
- The right to erasure
- The right to restrict processing
- The right to data portability
- The right to object

You have the right to request access to the personal information we hold about you. We normally respond within one month of receiving a valid request. If you would like to do this, please contact AUKS on 01483 503414 or enquiries@ageuksurrey.org.uk or data.privacy@ageuksurrey.org.uk .

If you remain dissatisfied, you have the right to complain to the Information Commissioner's Office (ICO), the UK's independent authority for data protection matters.

Website: www.ico.org.uk

Telephone: 0303 123 1113

Keeping your information safe

When you provide personal information, steps will be taken to ensure that it's treated securely:

- Information is stored on a secure database with password protection
- Confidential information is encrypted, where possible, or password protected if it needs to be referred on or shared
- Paperwork is kept in secure filing cabinets and secure portable cases when out of the office.

Keeping your information up to date

AUKS takes reasonable steps to ensure your information is accurate and up to date.

Where possible it will use publicly available sources to identify deceased records or whether you have changed address.

It would be appreciated if you let AUKS know when your contact details change.

How long is your information kept

AUKS will keep your information for no longer than is necessary for the purposes for which it was collected. The length of time your personal information is retained is determined by operational and legal considerations, as well as best practice.

For example, AUKS is legally required to hold some types of information to fulfil its statutory and regulatory obligations (e.g. health/safety and tax/accounting purposes).

Further reasons why personal information may be retained include:

- For auditing purposes
- Evidence in defence of a legal claim
- Ensuring you are removed from marketing if you prefer not to hear from us in the future.

Retention periods are reviewed on a regular basis, more details on retention periods are available on request - please email at enquiries@ageuksurrey.org.uk.

For queries relating to your personal information or data protection rights, please contact our Privacy Team at data.privacy@ageuksurrey.org.uk.

Use of 'cookies'

When you visit our website, certain information such as IP address, browser type and website usage information may be collected through cookies and similar technologies. Further information can be found in our Cookie Policy.

16 or under

If you are aged 16 or under, please obtain your parent/guardian's permission before you provide us with personal information.

Transferring your information outside of Europe

Age UK Surrey does not routinely transfer personal data outside the UK. Where personal data is transferred outside the UK, appropriate safeguards will be in place in accordance with UK data protection legislation.

Complaints

If you have concerns about how Age UK Surrey has handled your personal information, please contact us by telephone on 01483 503414 or by email at data.privacy@ageuksurrey.org.uk. We will acknowledge and investigate your complaint and

provide a response without delay.

If you remain dissatisfied, you have the right to complain to the Information Commissioner's Office (ICO), the UK's independent authority for data protection matters. Details can be found at www.ico.org.uk.

Review of this Policy

This Policy was reviewed in August 2026. It will be kept under regular review and updated where necessary.

If you require a hard copy of either of these documents, please telephone 01483 503414, enquiries@ageuksurrey.org.uk or data.privacy@ageuksurrey.org.uk .

This Privacy Policy applies to Age UK Surrey and its trading and other associated companies where applicable.