1. Policy Purpose

This policy explains how **BEAM Fieldwork Ltd** collect, use, and protect your Company and Employee information in line with the UK General Data Protection Regulation (GDPR).

2. Roles and Responsibilities

BEAM Fieldwork is the Data Controller for your Company and Employee data.

BEAM Fieldwork has an appointed shared Data Protection Officer (DPO) who monitors compliance, informs and advises on all Company data protection obligations, provides advice regarding Data Protection Impact Assessments (DPIAs), and acts on behalf of all stakeholders without bias.

The DPO acts independently, and as lead contact to protect the rights of individual Data Subjects, as lead contact for all Give Opinions and BEAM Fieldwork clients, delivery partners, governing bodies, and the Information Commissioner's Office (ICO).

BEAM Fieldwork appointed Data Protection Officer

Kay Middleton	hello@beamfw.co.uk 0161 850 9864
BEAM Fieldwork Ltd: ZA214416	Search the ICO Register

3. Privacy Policy Principles

BEAM Fieldwork takes your privacy seriously.

- **We will always protect your Company and Employee information:** Securing it against misuse and loss, and always fairly and reasonably.
- **We are always transparent:** Explaining what we collect, why, who we share it with, and who you should contact if you have any concerns.
- **We always uphold the law and legislation:** Following GDPR, UK law, laws of any country in which we are conducting business. Upholding the **Market Research Society (MRS) Code of Conduct**

4. Your Company & Employee Data

We collect or use the following Company and Employee information for:

4.1. **The operation of client or customer accounts**:
Names and contact details; Addresses; Purchase or service history; Account information, including registration details; Information used for security purposes.

4.2. **Information updates or marketing purposes**:
Names and contact details; Addresses; Purchase or account history.

4.3. **Research or archiving purposes**:

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Names and contact details; Addresses; Purchase or client account history.

4.4. Compliance with legal requirements:
Name; Contact information; Identification documents; Client account information; Any other personal information required to comply with legal obligations; Safeguarding information.

4.5. Protection of client welfare:
Names and contact information; Client account information.

4.6. Dealing with queries, complaints or claims:
Names and contact details; Addresses; Payment details; Account information; Purchase or service history; Customer or client accounts and records; Financial transaction information; Correspondence.

5. Lawful Basis & Data Protection Rights

Under UK data protection law, we must have a "lawful basis" for collecting and using your Company and Employee information. Which lawful basis we rely on may affect your data protection rights which are set out in brief below.

5.1. Your right of access
You have the right to ask us for copies of your Company and Employee information. You can request other information such as details about where we get Company and Employee from and who we share Company and Employee information with. There are some exemptions which means you may not receive all the information you ask for. Read more about the right of access.

5.2. Your right to rectification
You have the right to ask us to correct or delete Company and Employee information you think is inaccurate or incomplete. Read more about the right to rectification.

5.3. Your right to erasure
You have the right to ask us to delete Company and Employee information. Read more about the right to erasure.

5.4. Your right to restriction of processing
You have the right to ask us to limit how we can use your Company and Employee information. Read more about the right to restriction of processing.

5.5. Your right to data portability
You have the right to ask that we transfer the Company and Employee information you gave us to another organisation, or to you. Read more about the right to data portability.

5.6. Your right to withdraw consent
When we use consent as our lawful basis, you have the right to withdraw your consent at any time. Read more about the right to withdraw consent.

If you make a request, we must respond to you without undue delay and in any event within one month.

To make a data protection rights request, please contact us using the contact details at the top of this privacy notice.

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6. Lawful Bases: Data Collection and Use

6.1. Our lawful bases for collecting or using personal information for the operation of client or customer accounts are:

6.1.1. **Consent**: We have permission from you after we gave you all the relevant information. All of your data protection rights may apply, except the right to object. To be clear, you do have the right to withdraw your consent at any time.

6.1.2. **Contract:** We have to collect or use the information so we can enter into or carry out a contract with you. All of your data protection rights may apply except the right to object.

6.1.3. **Legal obligation:** We have to collect or use your information so we can comply with the law. All of your data protection rights may apply, except the right to erasure, the right to object and the right to data portability.

6.1.4. **Public task:** We have to collect or use your information to carry out a task laid down in law, which the law intends to be performed by an organisation such as ours. All of your data protection rights may apply, except the right to erasure and the right to portability.

6.2. Our lawful bases for collecting or using personal information for information updates or marketing purposes are:

6.2.1. **Consent:** We have permission from you after we gave you all the relevant information. All of your data protection rights may apply, except the right to object. To be clear, you do have the right to withdraw your consent at any time.

6.2.2. **Contract:** We have to collect or use the information so we can enter into or carry out a contract with you. All of your data protection rights may apply except the right to object.

6.2.3. **Legal obligation:** We have to collect or use your information so we can comply with the law. All of your data protection rights may apply, except the right to erasure, the right to object and the right to data portability.

6.2.4. **Public task:** We have to collect or use your information to carry out a task laid down in law, which the law intends to be performed by an organisation such as ours. All of your data protection rights may apply, except the right to erasure and the right to portability.

6.3. Our lawful bases for collecting or using personal information for research or archiving purposes:

6.3.1. **Consent:** We have permission from you after we gave you all the relevant information. All of your data protection rights may apply, except the right to object. To be clear, you do have the right to withdraw your consent at any time.

6.3.2. **Contract:** We have to collect or use the information so we can enter into or carry out a contract with you. All of your data protection rights may apply except the right to object.

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6.3.3. **Legal obligation:** We have to collect or use your information so we can comply with the law. All of your data protection rights may apply, except the right to erasure, the right to object and the right to data portability.

6.3.4. **Public task:** We have to collect or use your information to carry out a task laid down in law, which the law intends to be performed by an organisation such as ours. All of your data protection rights may apply, except the right to erasure and the right to portability.

6.4. Our lawful bases for collecting or using personal information to comply with legal requirements:

6.4.1. **Consent:** We have permission from you after we gave you all the relevant information. All of your data protection rights may apply, except the right to object. To be clear, you do have the right to withdraw your consent at any time.

6.4.2. **Contract:** We have to collect or use the information so we can enter into or carry out a contract with you. All of your data protection rights may apply except the right to object.

6.4.3. **Legal obligation:** We have to collect or use your information so we can comply with the law. All of your data protection rights may apply, except the right to erasure, the right to object and the right to data portability.

6.4.4. **Public task:** We have to collect or use your information to carry out a task laid down in law, which the law intends to be performed by an organisation such as ours. All of your data protection rights may apply, except the right to erasure and the right to portability.

6.5. Our lawful bases for collecting or using personal information to protect client welfare are:

6.5.1. **Consent:** We have permission from you after we gave you all the relevant information. All of your data protection rights may apply, except the right to object. To be clear, you do have the right to withdraw your consent at any time.

6.5.2. **Contract:** We have to collect or use the information so we can enter into or carry out a contract with you. All of your data protection rights may apply except the right to object.

6.5.3. **Legal obligation:** We have to collect or use your information so we can comply with the law. All of your data protection rights may apply, except the right to erasure, the right to object and the right to data portability.

6.5.4. **Public task**: We have to collect or use your information to carry out a task laid down in law, which the law intends to be performed by an organisation such as ours. All of your data protection rights may apply, except the right to erasure and the right to portability.

6.6. Our lawful bases for collecting or using personal information for dealing with queries, complaints or claims are:

6.6.1. **Consent:** We have permission from you after we gave you all the relevant information. All of your data protection rights may apply, except the right to object. To be clear, you do have the right to withdraw your consent at any time.

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6.6.2. **Contract:** We have to collect or use the information so we can enter into or carry out a contract with you. All of your data protection rights may apply except the right to object.

6.6.3. **Legal obligation:** We have to collect or use your information so we can comply with the law. All of your data protection rights may apply, except the right to erasure, the right to object and the right to data portability.

6.6.4. **Public task:** We have to collect or use your information to carry out a task laid down in law, which the law intends to be performed by an organisation such as ours. All of your data protection rights may apply, except the right to erasure and the right to portability.

6.7. Where we get personal information from:

- Directly from you
- Publicly available sources

6.8. Who we share it with:

- Suppliers and service providers of BEAM Fieldwork contracted to undertake business services (for example, but not limited to accounting, ICT) on behalf of BEAM Fieldwork Ltd.

7. Data Retention Periods

Accounting records	3 years
Complaints, records, letters, responses & customer communications received by an FCA regulated firm	5 years for complaints relating to MiFID business or collective portfolio management services
	3 years for all other complaints
Records documenting the firm's relationships and responsibilities to statutory and/or regulatory bodies and its legal responsibilities	Permanently held, no expiry
Supplier, business relationship documents, contracts, SLA's, audits, reviews etc	End of relationship + 6 years
Reviews, analysis, compliance monitoring, quality assurance, operational performance etc	5 years +1
Marketing, promotion, press releases	2 years after last action
Research Materials (pre tasks etc...)	12 months
Participant Information	12 months
Audio & Video Recordings	12 months
Transcripts	12 months

For more information on how long we store your Company and Employee information or the criteria we use to determine this please contact us using the details provided above.

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8. How to Complain

If you have any concerns about our use of your personal data, you can make a complaint to us using the contact details at the top of this privacy notice.

If you remain unhappy with how we've used your data after raising a complaint with us, you can also complain to the ICO:

- Information Commissioner's Office
  Wycliffe House, Water Lane, Wilmslow, Cheshire SK9 5AF
- Helpline number: 0303 123 1113
- Website: https://www.ico.org.uk/make-a-complaint

9. Policy Review

We reserve the right to update this Privacy Policy at any time.

This policy was updated in September 2026.

POLICY OWNER:	Kay Middleton, Director of Business Operations
POLICY REVIEW:	Annual
NEXT POLICY REVIEW:	September 2027 (or before)

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