# Conveyd privacy notice

Version 6 | Last updated: 16/10/2026

## Who we are

Two companies work together on your conveyancing. Each is responsible for your personal information in a different way, explained in the next section.

| Detail | Conveyd Ltd | Conveyd Legal Ltd |
|---|---|---|
| What we do | Runs the Conveyd platform and helps you share your property information | Carries out your conveyancing. Authorised and regulated by the Council for Licensed Conveyancers (CLC) |
| Company number | 15456762 | 17169196 |
| CLC licence number | Not applicable | 14755 |
| Contact about your data | privacy@conveyd.co.uk | privacy@conveyd.co.uk |

In this notice, "we" means whichever of us is responsible for the information being described. We say which one where it matters.

## Which of us does what

Who is responsible for your information depends on where you are in the process.

| Stage | Controller | What that means |
|---|---|---|
| Before you instruct us: using our website, making an enquiry, setting up a platform account | Conveyd Ltd | Conveyd Ltd handles your enquiry, onboarding and support, then passes your details to Conveyd Legal Ltd when you instruct us |
| Once you instruct us (when you accept our client care letter) | Conveyd Legal Ltd | Conveyd Legal Ltd is responsible for your case information. Conveyd Ltd hosts it on the platform and handles it only on Conveyd Legal Ltd's instructions |
| Identity and anti-money laundering checks, and any special category or criminal offence data | Conveyd Legal Ltd, always | Conveyd Ltd only hosts this information on Conveyd Legal Ltd's instructions. It never uses it for its own purposes |
| Improving the platform and Conveyd Ltd's own products | Conveyd Ltd, in its own right | Conveyd Ltd uses information from your case to monitor and improve the platform. For this purpose only, it is an independent controller |

Both companies are bound by strict duties of confidentiality and by data protection law.

# What information we collect

**For your conveyancing (Conveyd Legal Ltd, using the Conveyd platform)**

- Full name and contact details, including address history, email address and phone numbers
- Date of birth
- Whether you are a UK tax resident, and details of your circumstances that affect Stamp Duty Land Tax, such as whether you are a first-time buyer or buying an additional property
- National Insurance number, which HMRC requires for Stamp Duty Land Tax
- Identification documents and the results of identity and anti-money laundering checks
- Financial details, such as the source of your deposit, bank statements and mortgage details, including any bankruptcies
- Employment details, for fraud prevention

- Details of the property you are buying or selling, and related transaction documents
- Personal information about any adult living with you, and anyone gifting you money towards your deposit. You must have their permission to give us this
- Emails and messages between you, us and the other people involved in your transaction

**When you use our website and platform (Conveyd Ltd)**

- Technical data: IP address, login data, browser type and version, time zone and location setting, operating system and device
- Usage data: how you use the platform, how your transaction is progressing, and which documents you submit

# If your file includes information about someone else

Sometimes we need information about other people, such as an adult who will live in the property with you, or someone giving you money towards your deposit.
Before you give us their details, please make sure they're happy for you to share them, and show them this notice so they know how we'll use their information. If we contact them directly, for example to check the source of a gift, we'll tell them how we use their information at that point.

## Where we get your information from

Mostly from you. We also collect information from:

- your estate agent or referrer
- your mortgage broker, financial adviser or lender, where relevant
- identity verification and search providers, as part of checking who you are and the property
- property data providers, for details about the property such as title information
- each other: when you instruct us, Conveyd Ltd passes your intake details to Conveyd Legal Ltd

# Providing your information

You need to give us the information listed above so we can act for you. Some of it is required by law, such as the details we need for identity and anti-money laundering checks, and your National Insurance number for Stamp Duty Land Tax. The rest we need to carry out our contract with you.
If you don't give us this information, we may not be able to start or continue your conveyancing, and we may have to stop acting for you. If anything we ask for is optional, we'll tell you when we ask for it.

## Why we use your information, and our legal basis

We rely on our contract with you and on our legal obligations for the core work, not on your consent, because much of it, such as verifying your identity, isn't optional.

| What we use it for | Who | Legal basis |
|---|---|---|
| Carrying out your conveyancing | Conveyd Legal Ltd. Conveyd Ltd hosts the information on its instructions | Performing our contract with you |
| Identity and anti-money laundering checks, protecting you and us against fraud, unauthorised transactions, money laundering and tax evasion, telling you about referral fees and commissions, and meeting our legal and regulatory duties, including the CLC's rules and HMRC requirements | Conveyd Legal Ltd | Legal obligation |
| Taking your enquiry, setting up your account, onboarding you and supporting you | Conveyd Ltd | Performing our contract with you, and our legitimate interests in running a good service |
| Monitoring and improving the platform and our AI tools, including finding and fixing errors on the platform and keeping it secure | Conveyd Ltd | Our legitimate interests in running and improving a reliable service |
| Analytics and session recordings, to understand how people use the platform | Conveyd Ltd | Your consent |
| Telling you about other products, services or a newsletter | Whichever of us sends it | Your consent |

Where we rely on legitimate interests, we have weighed them against your rights, and you can object (see Your rights).

# Marketing

If we would like to tell you about other products, services or a newsletter, we only do that with your separate, freely given consent. You can withdraw it at any time, and it won't affect your conveyancing. To unsubscribe, use the link in any email or let us know. It can take up to five working days to take effect.

# Cookies and analytics

When you use the Conveyd platform, we use small files called cookies, and similar tools, to keep you logged in and to understand how the platform is used.

## Cookies we always use

These are needed to run the platform. You can't switch them off.

- Login cookies: these keep you signed in. Your access cookie lasts 15 minutes and is renewed using a refresh cookie that lasts up to 7 days
- Cookies to record your preferences: these remember whether you have seen our cookie notice and what you chose. They last 365 days

## Cookies and tools we only use with your permission

The first time you use the platform we ask whether you are happy for us to use analytics. If you say yes:

- Mixpanel records which pages you visit and which buttons you use. We link this to your account, including your name, email address and account ID
- FullStory records your sessions on the platform so we can see where people get stuck. We link recordings to your account ID and email address. We hide most on-screen text and we exclude document viewers and signing screens

Both are hosted in the EU. If you say no, we don't turn them on.

## Tools we use to run the platform

We use the following to keep the platform working. We don't ask permission for these because the platform can't work properly without them.

- Sentry, which tells us when something goes wrong. It receives your account ID and email address so that we can help if you report a problem
- Front, which runs the chat window and support inbox
- Knock, which delivers the notifications you see in the platform

## Changing your mind

You can change your choice at any time under Settings, then Privacy. The setting applies to the browser you are using, so you will need to set it again on each device. Switching

analytics off stops new data being collected. If you would like us to delete what we have already collected, email privacy@conveyd.co.uk.

# Who we share your information with

We share only what is needed to carry out your conveyancing, through secure channels. This includes:

- Each other, so your case can run on the platform
- Search providers, for property searches
- HM Land Registry and HMRC, to register your purchase and deal with Stamp Duty Land Tax
- Identity verification and anti-money laundering providers, Thirdfort
- Your lender, mortgage broker or financial adviser, where relevant to your transaction
- Your estate agent and the other side's conveyancer, where needed to move the transaction forward
- Technology suppliers that host or support the platform, including our cloud hosting provider (Google Cloud Platform) and the AI providers described below
- Email, notifications and support: SendGrid, Knock, Front and Slack
- Monitoring and analytics: Sentry for error monitoring, and Mixpanel and FullStory for analytics with your permission. See "Cookies and analytics"
- law enforcement agencies and regulators, including the CLC, where the law requires it

Our suppliers are bound by agreements that require them to protect your information. We don't share your personal information with anyone else without good reason. Contact us if you would like a full list of the third parties we use.

# How we use AI

We use AI-assisted tools to help manage your case, for example to read and summarise property documents and pull out key details.

## What the AI tools see

The tools receive the documents and text from your case that they need to do the job. That can include your name, your address, and the contents of documents such as title documents, searches, mortgage offers, bank statements and insurance documents. We don't send your identity documents or your photo to AI tools. These are handled by our identity check provider Thirdfort.

## Who provides the AI

We use Anthropic's Claude models and Google's Gemini models through Google Cloud's Vertex AI, and Google Cloud's document recognition to read scanned documents. We also use LangSmith to record how our AI is performing, which means it can see the text sent to and from the AI tools.

### Improving our own tools

We also use information from cases to test and improve our own AI tools, for example by checking how well they find issues in real cases. We don’t train or fine-tune AI models on your information, and we don’t sell it or share it with other firms or clients for their benefit.

### How your information is protected

All of this runs in data centres in the EU. The account is configured such that the models are unable to use your personal data for model training purposes.

### People stay in charge

We don't make any decision that has legal effects on you, or similarly significantly affects you, using automated processing alone. A qualified member of our team is always involved.

## International transfers

We store your information mainly in data centres in the UK (London).

Backups of data are held in the EU to allow business continuity in the event of the cloud provider having an outage across the UK region. The AI tools described above also operate in the EU. The UK treats the EU as providing an adequate level of data protection, so your information stays protected.

A few of our suppliers are based in, or can access information from, countries outside the UK and EU, including the United States. For example SendGrid (email sending) and Knock (notifications sending). When that happens, we only transfer your information under safeguards approved under UK law, such as the UK's International Data Transfer Addendum to the EU's standard contractual clauses. You can ask us for a copy of the safeguards we use.

## How we protect your information

- We encrypt personal and financial information in transit and in storage
- We store it in UK data centres, with the exception of encrypted backups being stored in the EU as above.
- We limit access to the people working on your matter, and to Conveyd staff who need it to coordinate your case or maintain the platform. Only staff who have a legitimate reason to view your data can actually view it
- We require all staff and contractors to follow confidentiality and data protection obligations
- We are working towards ISO27001 certification, which means our security will have been independently checked

If we become aware of a data breach likely to affect your rights or freedoms, we will notify the ICO where the law requires it, and tell you directly if there is a high risk to you.

# How long we keep your information

**Case files (Conveyd Legal Ltd).** In line with the CLC's Transaction Files Code, we keep your file for six years after completion of a sale, and fifteen years after completion for other matters, such as a purchase or remortgage. After that, your information is securely deleted. Where Conveyd Ltd handles case information on our instructions, it keeps it for these periods and no longer unless you choose for it to be stored for future access.

**Platform and website data (Conveyd Ltd).** We keep your account details and usage data for as long as we hold your case file, and then delete them. Analytics events are kept for 12 months and session recordings for 90 days. Error reports are kept for 90 days.

# Your rights

Under UK data protection law you can, free of charge:

- **Be informed:** be told how your information is used, and expect it to be used fairly
- **Access:** access your personal information, and details of how we use it, who we share it with and how long we keep it
- **Rectification:** have inaccurate or incomplete information corrected
- **Erasure:** ask us to erase your information when it is no longer needed, when you withdraw your consent or successfully object to us using it, or when we're using it unlawfully. This doesn't apply where we have a lawful reason to keep it, for example where our regulator requires us to keep your file for up to 15 years
- **Data portability:** receive a copy of your information in a structured, commonly used, machine-readable format, or have it sent to someone else
- **Object to direct marketing:** object to direct marketing at any time
- **Object to other use:** object, in some situations, to us continuing to use your information, including where we rely on legitimate interests
- **Restrict use:** ask us to restrict how we use your information in some circumstances
- **Automated decisions:** ask not to be subject to automated decisions, including profiling, that have legal or similarly significant effects on you
- **Withdraw consent:** withdraw your consent at any time, where we rely on it, for example for analytics or marketing. You can switch analytics off under Settings, then Privacy

The ICO's guidance on individuals' rights under the UK GDPR has more detail.

**How to use your rights.** Email privacy@conveyd.co.uk, which reaches both companies, or call or write to us. Whichever of us is responsible for the information you ask about will answer. Please send proof of your identity and address, and say which rights you want to use. We will reply within one month.

# Complaints

We hope you're happy with our service and would like to fix any concern directly. You can complain to us at complaints@conveyd.co.uk, we will acknowledge your complaint within 30 days.

You also have the right to complain to the Information Commissioner's Office (ICO), the UK's data protection regulator, particularly if you believe we have broken data protection law. Contact the ICO at https://ico.org.uk/concerns or on 0303 123 1113.

## Changes to this notice, and getting in touch

We don't intend to use your personal information for any purpose other than those set out here. If that changes, we will let you know by email or post.

This notice was first published on 09/10/2026. We review our privacy practices regularly and may update this notice from time to time. If we make a significant change, we will email you.

If you have questions about this notice or the information we hold about you, contact us at privacy@conveyd.co.uk.