

Orez Ltd customer privacy notice

This privacy notice tells you what to expect us to do with your personal information.

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Contact details

Telephone 07788980635

Email nick@orez.consulting

What information we collect, use, and why

We collect or use the following information to **provide and improve products and services for clients**:

- Names and contact details
- Occupation
- Usage data (including information about how you interact with and use our website, products and services)
- Website user information

We collect or use the following personal information for the **operation of client or customer accounts**:

- Names and contact details
- Addresses
- Purchase or service history
- Account information, including registration details
- Marketing preferences

We collect or use the following personal information **for the prevention, detection, investigation or prosecution of crimes**:

- Names and contact information
- Client accounts and records

- Financial information eg for fraud prevention or detection

We collect or use the following personal information for **information updates or marketing purposes**:

- Names and contact details

We collect or use the following personal information for **dealing with queries, complaints or claims**:

- Names and contact details
- Account information
- Purchase or service history
- Customer or client accounts and records
- Financial transaction information
- Correspondence

Lawful bases and data protection rights

Under UK data protection law, we must have a “lawful basis” for collecting and using your personal information. There is a list of possible [lawful bases](#) in the UK GDPR. You can find out more about lawful bases on the ICO’s website.

Which lawful basis we rely on may affect your data protection rights which are set out in brief below. You can find out more about your data protection rights and the exemptions which may apply on the ICO’s website:

- **Your right of access** - You have the right to ask us for copies of your personal information. You can request other information such as details about where we get personal information from and who we share personal 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.](#)
- **Your right to rectification** - You have the right to ask us to correct or delete personal information you think is inaccurate or incomplete. [Read more about the right to rectification.](#)
- **Your right to erasure** - You have the right to ask us to delete your personal information. [Read more about the right to erasure.](#)
- **Your right to restriction of processing** - You have the right to ask us to limit how we can use your personal information. [Read more about the right to restriction of processing.](#)

- **Your right to object to processing** - You have the right to object to the processing of your personal data. [Read more about the right to object to processing.](#)
- **Your right to data portability** - You have the right to ask that we transfer the personal information you gave us to another organisation, or to you. [Read more about the right to data portability.](#)
- **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.

Our lawful bases for the collection and use of your data

Our lawful bases for collecting or using personal information to **provide and improve products and services for clients** are:

- 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.
- 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.
- Legitimate interests – we’re collecting or using your information because it benefits you, our organisation or someone else, without causing an undue risk of harm to anyone. All of your data protection rights may apply, except the right to portability.

Our legitimate interests are:

- We collect and use personal information to provide tailored energy consultancy services, improve our offerings, and ensure effective client engagement. This processing is necessary to maintain contact with clients, deliver relevant insights, optimize energy strategies, and maintain service quality. The benefits—such as cost savings, regulatory compliance, and sustainability improvements outweigh any minimal risks, which are mitigated through strict data protection measures. We prioritise fairness and transparency, ensuring individuals’ rights are respected.

For more information on our use of legitimate interests as a lawful basis you can contact us using the contact details set out above.

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

- 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.
- 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.

Our lawful bases for collecting or using personal information **for the prevention, detection, investigation or prosecution of crimes** are:

- 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.
- 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.

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

- 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.
- 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.

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

- 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.
- 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.

Where we get personal information from

- Directly from you
- Regulatory authorities
- Publicly available sources
- Suppliers and service providers

How long we keep information

Data Retention Schedule

Data Type	Purpose	Retention Period	Justification
Client contact details	Communication, service delivery	6 years after last contact	Aligns with HMRC and business recordkeeping standards
Project documentation & reports	Service history, performance analysis	6 years from project end	Supports future audits and client reference
Financial records (invoices, payments)	Accounting, tax compliance	6 years	Required by HMRC regulations
Energy usage data (if collected)	Analysis, benchmarking	3–5 years	Useful for trend analysis; anonymised if retained longer
Marketing consent records	Proof of consent for communications	Until consent withdrawn + 2 years	Demonstrates compliance with PECR/GDPR
Employee or contractor data	HR, payroll, legal obligations	6 years after termination	Legal and contractual compliance

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

Who we share information with

Data processors Ionos, Google

This data processor does the following activities for us: Website management and hosting.

Others we share personal information with

- Organisations we're legally obliged to share personal information with
- Suppliers and service providers
- Professional consultants

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.

The ICO's address:

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>

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15/09/2025