



Law Society of Ireland Pension and Life Assurance Scheme

Defined Benefit

Data Privacy Statement

This information notice sets out details of the personal data relating to you that is collected by the Law Society of Ireland Pension and Life Assurance Scheme (the “**Scheme**”) and how that personal data is processed.

About Us

The Trustees are the controllers of personal data collected by the Scheme. If you have any questions about our use of your personal data, please contact hr@lawsociety.ie (the “**Society**”).

Personal Data that We Process

The personal data that we process about you will depend on your relationship with the Scheme. This information notice sets out details of personal data that is collected in relation to the following categories of people: active members (ie staff members currently contributing to the scheme), deferred members (staff members who have left the Society but not yet in receipt of a pension), pensioners, non-members (normally spouses or partners) who may or will receive benefits or have received benefits from the Scheme. By way of example, we collect and process the following information in relation to all of these categories of people:

- **Biographical Details** – We collect your name, previous names, gender, spouse’s name, date of birth, spouse’s date of birth, and your marital status and history.
- **Membership Reference** – We collect your PPS Number/Employee Number and we also assign a unique membership number to you.
- **Contact Details** – We collect your home address, email address and telephone number.
- **Status** – We record your status in relation to the Scheme e.g. active member, deferred member, pensioner etc.

For active members, deferred members and pensioners, we collect and process the following additional information:

- **Employment History** – We collect the date that you joined the Scheme, the date you joined the Society, the date you left the Society/retired, details of your employment

(e.g. job title, department, etc.), periods of service (e.g. details of part time work, leaves of absence, maternity leave, job share details etc.).

- Salary and Contributions – We collect details of your salary and contributions to the Scheme, including employer contributions, transfers from other schemes and additional voluntary contributions.
- Disability Benefits – Where a claim for disability benefits are made, we record the claim start and end date, the status of the claim, any special terms that apply, and details of the claim itself and any necessary medical records.
- Transfer in Benefits – Where you transfer from another scheme we record details of the scheme you transferred from, the amount that transfers into the Scheme, service dates for previous service and any additional service/benefits that you have purchased.

For active members, deferred members and pensioners who will or may receive benefits from the Scheme we collect and process the following additional information:

- Death Benefits – We record details of who you have nominated to receive death benefits, including their name, address and their relationship to you, beneficiary payment details and any special terms that apply.

For pensioners, non-members who may or will receive benefits from the Scheme, and non-members who have received benefits from the Scheme we collect and process the following additional information:

- Bank Details – We keep details of bank accounts in order to make payments, including BIC/IBAN numbers, payee name and address, and bank name and address.

For pensioners and former pensioners we collect and process the following additional information:

- Payroll – Where we make pension payments we record details of tax credits and payments and any deductions from payments that are made.

For deferred members and pensioners, we collect and process the following additional information:

- Benefits on Leaving/Retirement – When you leave the Scheme we keep details of the date you leave/retirement date, any dependant's dates of birth, any deferred or preserved benefits that you hold, benefit details that you are entitled to, any transfer of funds or refunds that are taken (including tax free cash that is taken), and details of pension benefit amount/annuity purchased.

Sources of Personal Data

We collect personal data from you directly, and from the following sources:

- Employer – Where the personal data above relates to your employment, we will generally receive it directly from your employer where you have not provided it to yourself.
- Government Agencies – We may receive certain data from government agencies, such as in relation to your tax status or where we seek assistance in tracing deferred members.

- Court Services – Where a pensions adjustment order is in place we will receive details of this from the Courts Services.

Purposes of Processing and Legal Basis

We process your personal data in order to administer the Scheme and comply with our obligations as Trustees under the law in relation to pensions in Ireland and the trust deed that established the Scheme. This involves the following processing of personal data:

- General Administration – We will process your personal data in order to operate the Scheme on a day to day basis, including making actuarial calculations. We will also process your personal data in order to respond to any queries you may have in relation to the Scheme.
- Calculating and Paying Benefits – We will process your personal data in order to calculate what benefits you are entitled to under the Scheme and to make payments of those benefits. We process such personal data on the basis of our legitimate interests in operating the Scheme for the benefit of all members and beneficiaries.
- Assessing Eligibility – We will process your personal data in order to assess your eligibility under the Scheme for benefits, including disability benefits. We process such personal data on the basis of our legitimate interests in operating the Scheme for the benefit of all members and beneficiaries. Where we process personal data in relation to your health in connection with a disability claim, we will process that personal data on the basis of the provisions of the Data Protection Act 2018 (when enacted) in relation to the processing of such data.
- Compliance – We will process your personal data in order to ensure that we comply with our legal requirements in relation to the operation of the Scheme, which includes engaging auditors to assist in assessing compliance. We process such personal data on the basis of our legitimate interests in operating the Scheme for the benefit of all members and beneficiaries, and to ensure compliance with our legal obligations.

Personal Data that We Require You to Provide

You are required to provide the all of the information that we set out above in order for us to operate the Scheme. If you fail to provide the information above, you will not be able to avail of benefits under the Scheme.

Recipients of Data

We may disclose your personal data to various recipients in connection with the above purposes, including:

- Employer (the Society) – We provide necessary details to your employer in connection with your participation in the Scheme.
- Administrator – We employ a third party service provider, Mercer, who operates the Scheme on our behalf and processes all of the data referred to above.
- Consultants & Investment Managers – We employ consultants and investment managers to provide us with advice in connection with the operation of the scheme, and in particular investment advice. In general consultants and investment managers are provided with aggregated data in relation to members of the Scheme so that they can use this to provide us with assistance in analysing how the Scheme

is functioning and to put in place plans for the future operation of the Scheme. This means that we do not routinely provide consultants and investment managers with your name or address; so that they cannot link the data that they are provided directly back to you.

- Actuary – The Scheme engages with an actuary, Mercer, in order to receive advice in relation to the funding of the Scheme and assessing its liabilities. These calculations are dependent on the status of members and beneficiaries, and therefore require the actuary to be given details about the members and beneficiaries.
- Auditors – We engage third party auditors, Deloitte, in order to ensure that the Scheme is operating in compliance with the Trust Deed and applicable law. In the process of undertaking an audit the auditor will be given access to all of our data, and may therefore process your personal data in the context of undertaking the audit.
- Payroll Processors – In order to make payments to pensioners, we engage the Society to make those payments on our behalf. The Society therefore processes personal data that is necessary to make those payments (e.g. name, address, bank details, and tax status)
- Insurer & Brokers – We engage the services of an insurance broker and insurance companies. These parties may require access to your personal data in order to process a claim that is made under a relevant insurance policy. We also engage brokers to select insurers in regard to the disability/permanent health and life assurance elements of the Scheme.
- Legal Advisors – We do not generally need to provide our legal advisors with personal data in relation to members and beneficiaries. However, there may be instances where there is a dispute with a member or beneficiary that requires us to get legal advice. In those circumstances, we will provide such personal data in relation to that member or beneficiary as is required in order to receive such legal advice.

Transfers Abroad

In connection with the above we may transfer your personal data outside the European Economic Area, including to a jurisdiction which is not recognised by the European Commission as providing for an equivalent level of protection for personal data as is provided for in the European Union. If and to the extent that we do so, we will ensure that appropriate measures are in place to comply with our obligations under applicable law governing such transfers, which may include entering into a contract governing the transfer which contains the ‘standard contractual clauses’ approved for this purpose by the European Commission or, in respect of transfers to the United States of America, ensuring that the transfer is covered by the EU-US Privacy Shield framework. Further details of the measures that we have taken in this regard are available from hr@lawsociety.ie.

Retention

We will only retain your personal data for as long as necessary to fulfil the purposes we collected it for, including for the purposes of satisfying any legal, accounting, or reporting requirements.

To determine the appropriate retention period for personal data, we consider the amount, nature, and sensitivity of the personal data, the potential risk of harm from unauthorised use or disclosure of your personal data, the purposes for which we process your personal data

and whether we can achieve those purposes through other means, and the applicable legal requirements.

Your Rights

You have the following rights, in certain circumstances, in relation to your personal data:

- *Right to access the data* - You have the right to request a copy of the personal data that we hold about you, together with other information about our processing of that personal data.
- *Right to rectification* - You have the right to request that any inaccurate data that is held about you is corrected, or if we have incomplete information you may request that we update the information such that it is complete.
- *Right to erasure* - You have the right to request us to delete personal data that we hold about you. This is sometimes referred to as the right to be forgotten.
- *Right to restriction of processing or to object to processing* - You have the right to request that we no longer process your personal data for particular purposes, or to object to our processing of your personal data for particular purposes.

In order to exercise any of the rights set out above, please contact hr@lawsociety.ie.

Complaints

If you have any queries or complaints in connection with our processing of your personal data, you can contact hr@lawsociety.ie

You also have the right to lodge a complaint with the Irish Data Protection Commission if you are not happy with the way we have used your information or addressed your rights. Details of how to lodge a complaint can be found at (<https://www.dataprotection.ie/docs/Contact-us/11.htm>) or you can call the Data Protection Commission at 353 (0)761 104 800.