



PRIVACY NOTICE

How Verta collects, uses and protects personal information

Verta Energy Solutions Ltd provides energy efficiency, retrofit and related property services. This notice explains what personal information we collect, why we use it, who we may share it with, how long we keep it and the rights you have under UK data protection law.

AT A GLANCE

DATA CONTROLLER **Verta Energy Solutions Ltd**

EMAIL **info@verta-energy.co.uk**

TELEPHONE **01978 254180**

LOCATION **Wrexham, Wales, UK**

Effective 25 September 2026

Applies to customers, prospective customers, website visitors, business contacts, suppliers, subcontractors and applicants.

01 Who we are

Verta Energy Solutions Ltd ("Verta", "we", "us" or "our") provides energy efficiency, retrofit, low-carbon and related property services. Depending on the project, this can include enquiries and quotations, property surveys and assessments, design, installation, testing, commissioning, handover, aftercare, remedial work, warranties, customer support, quality assurance and compliance evidence.

For most activities described in this notice, Verta acts as the data controller because we decide why and how personal information is used. On some funded or partner-led projects another organisation may determine the purpose of processing and Verta may act as its data processor. Where another organisation is a separate controller, it should provide its own privacy information.

We handle personal information in line with the UK GDPR, the Data Protection Act 2018, the Data (Use and Access) Act 2025 and the Privacy and Electronic Communications Regulations 2003, as amended.

02 What this notice covers

This notice applies to customers, prospective customers, property owners and occupiers, website visitors, business contacts, suppliers, subcontractors, job applicants and other individuals whose personal information we process in connection with our UK activities.

03 Personal information we collect

The information we collect depends on the service, property, scheme and our relationship with you. Where necessary, this may include:

- Identity and contact details, such as your name, address, property address, email address, telephone number and project reference details.
- Property and occupancy information, including property type, tenure, ownership or authority to instruct works, access arrangements, EPC or energy information and building condition.
- Survey, retrofit and technical information, including measurements, survey findings, plans, specifications, designs, installation records, commissioning results, completion documents, certificates, warranties and product information.
- Photographs, video and site evidence showing the property, installation areas, equipment, defects, remedial works and completed work.
- Financial and transaction information, including quotations, contracts, invoices, payment status, refunds and payment information where required.
- Eligibility and funding evidence where a funded scheme or delivery route requires information about household or property circumstances.
- Communications, complaint records, web enquiries, notes of conversations and call recordings where these are used.
- Website and device information, such as IP address, browser and device information, security logs, cookie identifiers and analytics data.
- Marketing preferences, supplier and subcontractor information, and recruitment information where relevant.

04 Where we get information from

We collect information directly from you and, where lawful and necessary, from other sources including:

- website forms, telephone calls, emails, surveys, contracts and customer support interactions;
- property owners, tenants, authorised representatives or household members;
- retrofit assessors, retrofit coordinators, designers, installers, subcontractors and principal contractors;
- energy suppliers, local authorities, landlords, housing providers, managing agents, funders and scheme administrators;
- TrustMark, MCS, certification, audit, warranty or guarantee organisations where applicable;
- finance brokers, lenders, credit reference or fraud prevention providers where a relevant lawful route requires this;
- public registers and official databases where relevant and lawful; and
- website, communications, security and analytics systems.

Where information comes from another source rather than directly from you, we provide the privacy information required by law within the applicable time limit unless a lawful exception applies.

05 Why we use your information and our lawful bases

We must have a lawful basis before using personal information. The lawful basis varies depending on the purpose.

Purpose	Examples	Typical lawful basis
Enquiries and quotations	Responding to enquiries, arranging surveys and preparing quotations.	Contract or steps before a contract.
Providing services	Surveying, designing, installing, commissioning, handover, aftercare and remedial work.	Contract.
Legal and regulatory compliance	Health and safety, Building Regulations evidence, statutory records and required disclosures.	Legal obligation.
Quality and compliance	Technical monitoring, audit preparation, complaints, warranty administration, fraud prevention and service improvement.	Legitimate interests and/or legal obligation.
Funded schemes	Assessing eligibility, administering projects and providing required evidence to scheme parties.	Contract, legal obligation, legitimate interests and, where appropriate, consent.
Marketing	Sending relevant information about Verta services and offers.	Consent or legitimate interests where permitted, subject to PECR.
Recruitment	Applications, references and pre-employment checks.	Contract steps, legal obligation and legitimate interests.

Where we rely on legitimate interests, we consider whether the processing is necessary and proportionate and whether your rights override our interests. Where consent is the lawful basis, you can withdraw it at any time.

06 Special category and criminal offence information

Some projects may require information that needs additional protection, for example health or disability information relevant to vulnerability, access, safety or scheme eligibility. We only process special category information where there is both a lawful basis under Article 6 UK GDPR and an additional condition under Article 9 UK GDPR and the Data Protection Act 2018.

Criminal offence information, including DBS information where required for a specific role, is only processed where the law permits it and appropriate safeguards are in place. We minimise sensitive information, restrict access and apply specific retention controls.

07 Surveys, retrofit and installation records

Energy efficiency and retrofit work can create a substantial technical record. Depending on the measure and delivery route, this can include:

- survey and assessment outputs, including whole-dwelling assessments where applicable;
- retrofit designs, specifications, technical calculations, risks, approvals and sign-offs;
- pre-installation inspection information and installation method information;
- installation, testing and commissioning evidence;
- completion and handover documents, certificates, product information and warranties;
- Building Regulations notifications or evidence where required;
- quality assurance, audit and scheme evidence packs;
- complaint, defect, remedial and aftercare records; and
- records required to demonstrate compliance with applicable PAS 2030, PAS 2035, MCS, TrustMark, warranty, contractual or scheme requirements.

These technical records can contain personal information because they are linked to a property, customer, occupier or project. We only retain and share the personal elements needed for the relevant purpose.

08 Property photographs and site evidence

As part of surveying, assessing, installing and verifying energy efficiency work, we may take photographs or video recordings of your property before, during and after work is carried out. We use this evidence for technical assessment, installation verification, quality assurance, regulatory or scheme compliance, warranty administration, complaints, remedial work and audit purposes.

We take reasonable steps to avoid capturing people, private documents or unrelated personal possessions where they are not needed for the purpose of the record.

09 Funded schemes and eligibility information

Where work is delivered through a funded, local authority, energy supplier or other scheme, additional information may be needed to confirm eligibility, prove that the correct measure was delivered and satisfy audit requirements. We only request information reasonably necessary for the relevant route and explain where particular evidence is mandatory.

10 Who we share information with

We only share personal information where it is lawful, necessary and proportionate. Depending on the work, recipients may include:

- retrofit assessors, retrofit coordinators, designers, installers, specialist subcontractors and principal contractors;
- energy suppliers, local authorities, landlords, housing providers, managing agents, funders and scheme administrators;
- TrustMark, MCS, certification, accreditation, audit, assurance, warranty and guarantee organisations where applicable;
- building control bodies and other authorities where the work or law requires it;
- IT, CRM, cloud hosting, telephony, document management, e-signature, payment and other service providers acting on our behalf;
- professional advisers, insurers, auditors and legal representatives;
- finance brokers, lenders, credit reference or fraud prevention providers where a relevant finance route applies; and
- law enforcement, regulators, courts or public authorities where disclosure is required or permitted by law.

Where another organisation processes information for us, we require appropriate contractual and security safeguards. Some organisations will act as separate controllers and are responsible for their own privacy information.

11 International transfers

Some technology or service providers may process or access information outside the UK. Where personal information is transferred internationally, we use a lawful transfer mechanism and appropriate safeguards. This can include UK adequacy regulations, the International Data Transfer Agreement, the UK Addendum to approved contractual clauses, or another mechanism permitted by UK data protection law.

12 How long we keep information

We keep personal information only for as long as necessary for the purpose for which it was collected and to meet legal, contractual, scheme, warranty, audit and claims requirements. Retention periods vary by record type.

Record type	Typical approach
Enquiries that do not proceed	Kept for a limited period for follow-up and business records, then deleted or anonymised.
Contracts and core installation records	Normally at least six years, or longer where a scheme, warranty, audit or claim requires it.
Performance estimates	At least ten years where an applicable certification or quality requirement requires this.
Warranty and guarantee records	Kept for the warranty or guarantee period plus any necessary claims or audit period.
Complaints and remedial records	Kept for the period needed to investigate and evidence the outcome, usually aligned to the contract or claim period.
Financial and tax records	Kept for the applicable statutory accounting and tax period.
Marketing preferences and suppression	Kept for as long as needed to evidence choices and respect objections or opt-outs.

13 How we protect information

We use technical and organisational measures appropriate to the nature and risk of the information we handle. These can include role-based access controls, password and authentication controls, encryption and secure transmission where appropriate, controlled storage and disposal, back-up and recovery arrangements, supplier due diligence, staff training, incident procedures and periodic reviews.

If a personal data breach occurs, we investigate it promptly. Where the law requires it, we notify the Information Commissioner's Office and affected individuals within the applicable legal timescales.

14 Marketing communications

We may contact you about relevant Verta services where the law allows us to do so. For email, text and similar electronic marketing to individuals, we obtain consent unless the PECR soft opt-in applies and all of its conditions are met. You can opt out at any time using the unsubscribe method provided or by contacting us.

Marketing preferences do not affect service, safety, warranty, regulatory or other essential communications connected with work you have asked us to carry out.

15 Cookies and website technologies

Our website may use cookies and similar technologies for essential functions, security, preferences, analytics and, where used, advertising or marketing measurement. We do not place non-essential cookies or similar technologies before obtaining the consent required by PECR. Where non-essential technologies are used, visitors are given a clear choice and a way to change or withdraw consent.

16 Automated decision-making

Verta does not currently make solely automated decisions about individuals that produce legal effects or similarly significant effects as part of its ordinary customer service and installation activities. If this changes, we will provide the information and safeguards required by UK data protection law.

17 Your data protection rights

Depending on the circumstances and lawful basis, you may have the right to:

- ask for access to your personal information and receive a copy;
- ask us to correct inaccurate or incomplete information;
- ask us to erase information in certain circumstances;
- ask us to restrict processing in certain circumstances;
- object to processing based on legitimate interests and object to direct marketing at any time;
- receive certain information in a portable format where data portability applies;
- withdraw consent at any time where we rely on consent; and
- raise concerns about certain forms of automated decision-making where applicable.

These rights are not absolute and exemptions can apply. We may need to verify your identity before responding. We normally respond within one month, subject to any lawful extension or pause permitted by data protection law.

18 Complaints and contact

If you have concerns about how we have used your personal information, please contact us first so that we can investigate and try to resolve the issue. You can also use the contact details below to exercise a data protection right.

ORGANISATION	Verta Energy Solutions Ltd
EMAIL	info@verta-energy.co.uk
TELEPHONE	01978 254180
LOCATION	Wrexham, Wales, UK

You also have the right to complain to the Information Commissioner's Office (ICO), the UK supervisory authority for data protection. Current guidance and contact information are available at ico.org.uk.

19 Changes to this notice

We may update this Privacy Notice from time to time to reflect changes in law, regulation, our services, technology, suppliers or how we use personal information. The current version will be made available through our website. Where a change is significant, we will take reasonable steps to bring it to the attention of affected individuals where appropriate.

BETTER HOMES. DONE PROPERLY.
Verta Energy Solutions Ltd