

HAPPILY SORTED

Privacy Policy

Your privacy is an important part of how I work.

This Privacy Policy explains what personal information Happily Sorted may collect, why I use it, how I keep it safe and the choices you have about your information.

Happily Sorted is registered with the **Information Commissioner's Office (ICO)**, registration number **ZA303680**.

What information I may collect

I may collect information when you:

- contact me through the website, email, phone, WhatsApp or social media;
- book a consultation or session;
- complete a client form or agree to my Terms and Conditions;
- take part in coaching or organising sessions;
- provide a review, testimonial or photograph;
- agree to a recording or the use of an AI note-taking service; or
- attend an event or activity I run.

The information I hold may include your name, contact details, address where relevant, booking information, client forms, correspondence and information you choose to share during our work together.

Because of the nature of coaching, you may sometimes choose to share information about your health, neurodiversity, work, relationships, home life or other personal circumstances. This is always your choice. I use it only to inform our work together, I treat it as particularly sensitive, and I do not share it with anyone else except as set out under Confidentiality below.

How I use your information

I use your information to:

- respond to enquiries;
- arrange and provide coaching and organising services;
- communicate with you about our work together;
- understand your needs and tailor my support;
- manage bookings, invoices and payments;
- maintain appropriate professional and business records;
- meet legal, tax, insurance and professional requirements; and
- run and improve Happily Sorted.

I use your information where it is needed to provide the service you have asked for, meet my legal or professional responsibilities, run Happily Sorted appropriately, or where you have given permission.

Confidentiality

What you share during coaching or organising sessions is treated as confidential.

Information will not be shared without your permission unless I am legally required to do so, or where there is an imminent or likely risk of serious harm to you or someone else.

If your coaching is funded by an employer, Access to Work or another organisation, we will agree beforehand what information, if any, may be shared with them.

Notes, AI note-taking and recordings

During sessions I may make brief handwritten notes to help me hold my thoughts and keep track of our conversation. These are for my use only and are destroyed after the session.

If we agree that written notes or a summary would be helpful, I may use an AI note-taking service to help produce them. I will only use this where we have agreed beforehand, and I will review and edit the notes before they are shared with you.

A copy of notes may be kept while we are working together so that we can refer back to it.

Coaching sessions are not routinely recorded. If a recording is useful for mentoring, supervision, training or professional credentialing, this will always be agreed with you beforehand and the recording will be deleted when it is no longer needed.

How I keep your information safe

Personal information is stored using password-protected systems and reputable cloud-based services.

Any paper records are stored securely and destroyed when they are no longer needed.

I take reasonable steps to ensure that the information I hold is kept secure and only retained for as long as necessary.

Third-party services

I use trusted third-party services to help run Happily Sorted. These may include website and booking services, email and communications, video calling, AI note-taking, accounting, payment processing and cloud storage.

These providers may process limited personal information where necessary to provide their service and have their own privacy and security arrangements.

Where you use a third-party platform, such as for an online session or booking, that provider's privacy policy will also apply.

I do not sell your personal information.

Reviews, photographs and social media

Happily Sorted is active on social media, including Facebook, Instagram and LinkedIn.

If you interact with me through social media, that platform's own privacy policy will apply.

If you choose to publish a public review, for example on Google, it may be referenced or shared in Happily Sorted marketing. You can ask me to stop using it in my own marketing where removal is reasonably possible.

Photographs of your home, belongings or our work together will not be used for marketing without your agreement.

Client stories may occasionally be shared in an anonymised way, but information that identifies you will not be shared without your permission.

ICF credentialing

As an International Coaching Federation credentialed coach, I may need to keep a record of coaching hours for professional credentialing purposes. This may include your name, contact details, the dates of our coaching relationship and the number of coaching hours.

On occasion, the ICF may choose to verify coaching experience. If this happens, only the information needed to confirm that coaching took place would be shared. The content of our coaching conversations is not shared.

You can let me know if you do not want your details recorded for this purpose.

How long I keep your information

I only keep personal information for as long as it is reasonably needed.

Some client and business records may be kept for up to **six years** where required for legal, tax, insurance or professional purposes.

Recordings are deleted when the purpose for which they were created has been completed.

Information from enquiries that do not lead to client work will not be kept longer than necessary.

Your personal information

You can contact me at any time to:

- ask what personal information I hold about you;
- ask for incorrect information to be corrected;
- ask for information to be deleted where I am able to do so;
- withdraw permission where you previously agreed to information being used; or
- ask any questions about how your information is handled.

I will normally respond to requests within **one calendar month**. If you are unhappy with how your personal information has been handled, you also have the right to contact the **Information Commissioner's Office (ICO)**.

Cookies and other websites

The Happily Sorted website uses cookies to help the website work and understand how visitors use it. You can manage your cookie choices through the website or your browser settings.

The website may also contain links to other websites. Once you leave the Happily Sorted website, those organisations are responsible for how they use your information, so I recommend checking their privacy policies.

Contact

If you have any questions about this Privacy Policy or the information I hold about you, please contact: **Lynn Kirk**, Data Controller, Happily Sorted - lynn@happilysorted.co.uk

This Privacy Policy may be updated occasionally. The latest version will always be available on the Happily Sorted website.

Last updated: September 2026