GREENBANK
PORTFOLIO

Privacy Policy

Last updated: 13 September 2026

Greenbank Portfolio respects your privacy and is committed to protecting your personal information.

This Privacy Policy explains how personal information is collected, used, stored and shared when you visit the Greenbank Portfolio website, make an enquiry, book a call, become a client, use Greenbank Portfolio services or otherwise interact with the business.

1. Who I am

Greenbank Portfolio is the trading name of Jessica Greenbank, a sole trader based in the United Kingdom.

For the purposes of UK data protection law, Jessica Greenbank trading as Greenbank Portfolio is the data controller responsible for the personal information described in this Privacy Policy, except where Greenbank Portfolio processes information solely on the instructions of a client.

Business address: Bothams Hall, Broadbottom, Cheshire, SK14 3AW
Email: jessica@greenbankportfolio.co.uk
Website: greenbankportfolio.co.uk

If you have any questions about this Privacy Policy or how your personal information is used, please contact me using the email address above.

2. The information I may collect

The personal information I collect depends on how you interact with Greenbank Portfolio.

This may include:

- Your name
- Job title or role
- Company or agency name
- Business address
- Email address
- Telephone number
- Information provided when making an enquiry
- Information provided when booking or attending a call
- Communications between you and Greenbank Portfolio
- Contract and agreement information
- Electronic signatures
- Billing and invoicing information
- Payment and transaction information
- Project and design request information
- Comments, feedback and project history

- Information contained within files and materials you provide
- Website usage and technical information where collected through the website or permitted analytics technologies
- Marketing preferences and records of any opt-outs or objections

Clients may also provide materials for use within design projects, including:

- Logos and brand guidelines
- Fonts
- Brand and lifestyle imagery
- Headshots
- Employee names and contact details
- Property information and photographs
- Testimonials
- Existing marketing materials
- Legal, regulatory or disclaimer wording
- Other content required for a particular project

Some of these materials may contain personal information relating to people other than the person directly engaging Greenbank Portfolio.

Where a client supplies personal information relating to another person, the client is responsible for ensuring that they have an appropriate right or lawful basis to provide that information for the intended purpose.

Greenbank Portfolio does not intentionally collect special category personal information, such as information about health, ethnicity, religion, political opinions or sexual orientation, unless there is a genuine and lawful reason for doing so.

Greenbank Portfolio provides business-to-business services and its services are not intended for children.

3. How I collect personal information

I may collect personal information:

- Directly from you when you contact me
- When you submit an enquiry through the Greenbank Portfolio website
- When you book or attend an Intro Call
- Through email or other business communications
- When you enter into a contract or Creative Partner agreement
- When you set up or make a payment
- When you access or use a Greenbank Portfolio client portal
- When you submit a design request
- When you upload or send files, content or brand assets
- During the course of providing services to you
- Through social media when you contact or interact with Greenbank Portfolio
- From publicly available business sources where appropriate
- From your employer, agency or another person within your organisation
- From service providers involved in operating the business

Where information is obtained from another source, I will handle it in accordance with applicable data protection law.

4. How I use personal information

I may use personal information to:

- Respond to enquiries

- Arrange and manage calls and meetings
- Understand an agency's requirements
- Prepare quotations and project proposals
- Enter into and manage client contracts and Creative Partner agreements
- Set up and manage client accounts and portals
- Provide design and Creative Partner services
- Manage design requests, projects and revisions
- Communicate about ongoing and completed work
- Store and manage client-supplied brand assets and project files
- Create invoices and maintain financial records
- Process and reconcile payments
- Manage subscriptions and Design Credit usage
- Maintain records of client relationships and project history
- Provide ongoing support
- Arrange printing or other third-party services where requested
- Maintain and improve the Greenbank Portfolio website and services
- Protect the security and integrity of Greenbank Portfolio systems
- Meet legal, tax, accounting and regulatory obligations
- Establish, exercise or defend legal claims
- Send relevant business marketing where permitted by law
- Maintain records of marketing preferences and objections

I will not use personal information for purposes that are incompatible with those described above without an appropriate legal basis.

5. Lawful bases for using personal information

UK data protection law requires a lawful basis for processing personal information.

Depending on the circumstances, Greenbank Portfolio may rely on the following:

Contract

Personal information may be processed where it is necessary to enter into or perform a contract with you.

This includes providing agreed services, managing projects, communicating about work, invoicing and administering Creative Partner subscriptions.

Legitimate interests

Personal information may be processed where it is necessary for the legitimate interests of Greenbank Portfolio or another party, provided those interests are not overridden by your rights and interests.

These legitimate interests may include:

- Running and developing the business
- Managing client and prospective client relationships
- Responding to business enquiries
- Maintaining appropriate business and project records
- Protecting the business and its systems
- Understanding how services are used
- Communicating with relevant business contacts
- Carrying out appropriate business-to-business marketing
- Establishing, exercising or defending legal rights

Legal obligation

Personal information may be processed where necessary to comply with legal, tax, accounting or regulatory requirements.

Consent

Where consent is required, personal information will be processed on the basis of that consent.

You may withdraw your consent at any time. Withdrawal will not affect the lawfulness of processing carried out before consent was withdrawn.

6. Marketing and prospective clients

Greenbank Portfolio may contact businesses and relevant business contacts about its services where permitted by applicable data protection and direct marketing laws.

This may include appropriate business-to-business communication by post, email or social media.

Where personal information is used for direct marketing, you can object at any time.

Every reasonable effort will be made to respect marketing preferences and opt-out requests. Where you ask not to receive marketing, I may retain limited information on a suppression list so that your preference can continue to be respected.

Greenbank Portfolio may also maintain information about prospective clients, previous enquiries and business contacts where there is a legitimate business reason to do so.

These records will be reviewed periodically and information that is no longer reasonably required will be removed.

7. Payments

Greenbank Portfolio uses third-party services to manage invoicing, payments and business banking.

Xero is used for invoicing, recurring invoices, billing records, payment records, expenses and bookkeeping.

GoCardless is used for Direct Debit payments, recurring payments and eligible one-off bank payments.

Where GoCardless is used, clients provide the information required to establish or make a payment through GoCardless. Greenbank Portfolio does not require clients to provide their online banking credentials directly to Greenbank Portfolio.

Monzo is used for business banking and may contain information such as payer or payee names, transaction amounts, payment references and other transaction information.

Payment providers process information in accordance with their own privacy terms and legal obligations.

8. Service providers and sharing information

Greenbank Portfolio uses third-party services to operate the business and provide services to clients.

Personal information may therefore be processed by or shared with relevant providers where necessary.

These currently include:

- **Wix - website hosting, website functionality and website-based enquiries**
- **Zapier - workflow automation, including transferring website enquiry information between Wix and ClickUp**
- **Google Workspace - Gmail, Drive, Docs, Sheets, Slides, Meet, Calendar and other business productivity services**
- **OpenAI - ChatGPT and connected AI-assisted business tools used to support appropriate business, administrative and creative tasks**
- **ClickUp** - client and project management, Creative Partner client portals, design requests, files, comments, project history and Design Credit tracking
- **Canva** - design creation and production
- **Xero** - invoicing, accounting and financial administration
- **GoCardless** - payment and Direct Debit processing
- **PandaDoc** - contracts, Creative Partner agreements and electronic signatures
- **Monzo** - business banking

Information may also be shared where appropriate with:

- Printers and production suppliers where a client asks Greenbank Portfolio to arrange printing or production
- Professional advisers such as accountants, bookkeepers, legal advisers or insurers where required
- IT or technical service providers
- Government bodies, regulators, law enforcement agencies, courts or other authorities where disclosure is legally required
- Other suppliers where their involvement is necessary to provide an agreed service

Only information reasonably necessary for the relevant purpose will be shared.

Greenbank Portfolio does not sell personal information.

9. Client-supplied information and design materials

Clients may provide Greenbank Portfolio with personal information for inclusion in marketing materials or for use in providing a service.

This may include employee details, photographs, property information, testimonials or information relating to customers, vendors, landlords or other individuals.

Where Greenbank Portfolio processes this information solely on the client's instructions, the client may be the data controller and Greenbank Portfolio may act as a data processor.

Clients are responsible for ensuring that personal information and other materials they provide to Greenbank Portfolio can lawfully be supplied and used for the requested purpose.

Appropriate data protection provisions may also be included within Greenbank Portfolio's client Terms & Conditions or other agreements where required.

10. Portfolio and promotional use

Client work will not be featured on the Greenbank Portfolio website, portfolio, social media or other promotional materials without first seeking the client's permission.

Where permission is obtained, only appropriate information and materials will be used for the agreed purpose.

Greenbank Portfolio will not present amended third-party work as original Greenbank Portfolio design work.

11. International transfers

Some of the service providers used by Greenbank Portfolio operate internationally or may store or process personal information outside the United Kingdom.

Where personal information is transferred outside the UK, Greenbank Portfolio will rely on an appropriate lawful transfer mechanism where required.

This may include transferring information to a country recognised by the UK as providing an adequate level of data protection or relying on appropriate contractual safeguards or another permitted mechanism.

Further information about the safeguards used by a particular provider can be requested by contacting Greenbank Portfolio.

12. How long I keep personal information

Personal information is kept only for as long as reasonably necessary for the purpose for which it was collected, including legal, tax, accounting, contractual and legitimate business requirements.

Different types of information may therefore be retained for different periods.

In general:

- Enquiry and prospective client information will be retained for as long as there is a reasonable business reason to maintain the relationship or record and will be reviewed periodically.
- Client, contractual and project records may be retained for the duration of the relationship and afterwards where necessary for legal, tax, accounting, contractual or business record-keeping purposes.
- Financial and accounting records will be retained for the periods required by applicable law.
- Marketing suppression information may be retained where necessary to ensure that an opt-out or objection continues to be respected.
- Completed design and project files may be retained as part of Greenbank Portfolio's design archive to allow future amendments, maintain project history and support returning clients, unless there is a reason they should be deleted sooner.

Information will be securely deleted or anonymised when it is no longer reasonably required.

13. Keeping personal information secure

Greenbank Portfolio takes reasonable technical and organisational measures to protect personal information against accidental loss, misuse, unauthorised access, alteration or disclosure.

This includes using reputable business systems and service providers, appropriate account security and access controls, and limiting access to personal information to what is reasonably required for business purposes.

No method of electronic storage or transmission is completely secure, but reasonable steps are taken to protect the information held.

14. Your data protection rights

Depending on the circumstances, UK data protection law may give you rights in relation to your personal information, including the right to:

- Ask for access to personal information held about you

- Ask for inaccurate or incomplete information to be corrected
- Ask for personal information to be deleted in certain circumstances
- Ask for processing to be restricted in certain circumstances
- Object to certain uses of your personal information, including direct marketing
- Ask to receive or transfer certain personal information in a portable format where applicable
- Withdraw consent where processing is based on consent
- Raise a concern about how your personal information is being used

These rights do not apply in every circumstance and may be subject to legal exceptions.

To exercise a right or ask a question about your personal information, contact:

jessica@greenbankportfolio.co.uk

I may need to verify your identity before responding to a request.

15. Complaints

If you have a concern about how Greenbank Portfolio uses your personal information, please contact me first so that I can try to resolve it.

You also have the right to make a complaint to the Information Commissioner's Office (ICO), the UK's data protection regulator.

Information about making a complaint is available through the ICO's website.

16. Cookies and website analytics

The Greenbank Portfolio website may use cookies and similar technologies required for the website to function.

Where non-essential cookies or similar technologies require consent, they will only be used in accordance with applicable consent requirements.

Greenbank Portfolio may introduce services such as Google Analytics or Google Tag Manager in future. Appropriate cookie information and consent controls will be reviewed before non-essential tracking technologies are enabled.

More detailed information about cookies used by the website may be provided through a separate Cookie Policy or cookie notice.

17. Artificial intelligence tools

Greenbank Portfolio may use artificial intelligence tools, including ChatGPT provided by OpenAI, to support appropriate business, administrative and creative tasks. This may include drafting or reviewing communications, working with business documents and files, organising or summarising information, research and other business support activities.

Where AI tools are connected to business services such as Gmail or Google Drive, personal information contained within relevant emails, files or other business information may be processed when those connected tools are deliberately used for a particular task. Connecting a service does not mean that all information held within that service is routinely submitted to or processed by the AI tool.

Greenbank Portfolio will seek to limit the personal information processed through AI tools to what is reasonably necessary for the relevant purpose and will consider privacy, confidentiality and data protection requirements when using them. AI services are provided by third parties and may process information in accordance with their applicable terms, privacy arrangements and data-processing commitments.

18. Social media and external websites

Greenbank Portfolio may maintain profiles on third-party social media platforms.

If you contact or interact with Greenbank Portfolio through a social media platform, that platform may also process your information under its own privacy terms.

The Greenbank Portfolio website may contain links to external websites or services. Greenbank Portfolio is not responsible for the privacy practices of third-party websites and you should review their privacy information separately.

19. Changes to this Privacy Policy

This Privacy Policy may be updated from time to time to reflect changes to Greenbank Portfolio's services, systems, legal obligations or the way personal information is used.

The latest version will be published on the Greenbank Portfolio website with an updated revision date.

Where a change materially affects how existing personal information is used, appropriate steps will be taken to bring that change to the attention of affected individuals where required.

20. Contact

For questions about this Privacy Policy or how Greenbank Portfolio handles personal information, contact:

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