

Privacy Notice

Why are we asking you to read this document?

We collect and store information about you when you engage us for estate planning/legal services. This information will relate to your individual personal circumstances. It may also include special categories of personal data such as data about your health, if this is necessary for the provision of our services. We would like to explain to you what we will need to do with Your Information, and the various rights you have in relation to Your Information.

What do we mean by “Your Information”?

Your Information means any information describing or relating to you. Your Information may identify you directly, for example your name, address, date of birth and the like. Your Information may also identify you indirectly, for example, your employment situation, your physical and mental health history or any other information that could be associated with your cultural or social identity.

Information about connected individuals We may need to gather personal information about your close family members and dependents in order to provide our service to you effectively. For example names and addresses of any trustees and beneficiaries named in your will. In such cases it will be your responsibility to ensure that you have the consent of the people concerned to pass their information to us.

Why do we need to collect and use your personal data?

There are a number of lawful bases on which organisations can use (or process) your personal data. Performance of a Contract - The primary legal basis that we intend to use for the processing of your data is for the performance of a contract with you. The information that we collect about you is essential for us to be able to carry out the services that you require from us effectively. Without collecting your personal data we would be unable to fulfil our legal obligations. We will contact you by post, telephone and electronic means.

Non client/third party personal data – We rely on the basis of legitimate interests where it is necessary to collect and process third party/non client personal data which is necessary for the performance of a contract with you and to comply with our legal obligations.

Changes in legislation – Part of fulfilling our contract with you means it may also be necessary to contact you with regards to changes in legislation in

order to ensure that your estate planning/legal services remain effective. We will contact you by post, telephone and electronic means.

Special category data – Where special category data is required, in addition to processing under the lawful bases referred to above, we will also generally rely on the condition that processing is necessary for the establishment, exercise or defence of legal claims or whenever courts are acting in their judicial capacity to collect and process this information as detailed in Article 9(2)(f).

Legitimate Interests

If we use your information for a reason other than to complete your contract, or to advise you of changes in legislation, such as contacting you with regards to additional legal products and services, then we generally rely on the following lawful basis:

- Where it is necessary for the purposes of the legitimate interests pursued by us or a third party in line with GDPR Article 6(1)(f).
- Legitimate interests means the interest of our company in conducting and managing our business, to enable us to give you the best services and products.

Additional Products & Services

We may rely on Legitimate Interests for the purpose of sending you information about our products and services. For example, we have an interest in making sure the information is relevant for you, so we may process your personal data in order to provide you with information that is specifically tailored to your interests. We will contact you by post, telephone and electronic means.

Before doing this, we ensure that we consider and balance any potential impact on you (both positive and negative), and your rights under data protection laws with our business objectives. Our legitimate business interests do not automatically override your interests. We will not use your personal data for activities where our interests are overridden by the impact on you (unless we have your consent) or are otherwise, required or permitted by law.

You are of course, free to opt out of receiving these messages at any time. We will include clear information about how to do so in all of our messages.

We will not share your information with other companies other than those it is necessary to engage for professional compliance, accountancy or legal services.

Who might we share your information with?

In order to deliver our services to you effectively we may send your details to third parties such as those that we engage for professional compliance, accountancy or legal services.

Where it is necessary to send your personal data to third parties to comply with the contract, we confirm that these third parties will have confirmed their compliance with the GDPR. Where it is necessary for your personal data to be forwarded to a third party, we will use appropriate security measures to protect your personal data in transit.

To fulfil our obligations in respect of prevention of money-laundering and other financial crime we may send your details to third party agencies for identity verification purposes.

How long do we keep hold of your information?

During the course of our relationship with you we will retain personal data which is necessary to provide services to you. We will take all reasonable steps to keep your personal data up to date throughout our relationship. We reserve the right to retain data for as long as is required thereafter where we believe it is in our legitimate interests to do so.

You have the right to request deletion of your personal data. We will comply with this request, subject to the restrictions of our regulatory obligations and legitimate interests as noted above.

How can I access the information you hold about me?

You have the right to request a copy of the information that we hold about you. If you would like a copy of some or all of your personal information please email or write to us using the contact details noted above. You will be required to complete a Subject Access Request form and provide us with proof of your identity in order for us to comply with your request.

Please note that you have the right to make a request however, when we receive this we may object to your request if we do not agree with it. We will however inform you if the request has been granted or not.

We have an obligation to ensure that your personal information is accurate and up to date. Please ask us to correct or remove any information that you think is incorrect.

Information obtained from third parties

When obtaining personal data from other sources, we do not need to provide individuals with privacy information if:

- The individual already has the information;
- Providing the information to the individual would be impossible;

- Providing the information to the individual would involve a disproportionate effort;
- Providing the information to the individual would render impossible or seriously impair the achievement of
- the objectives of the processing;
- We are required by law to obtain or disclose the personal data or;
- We are subject to an obligation of professional secrecy regulated by law that covers the personal data.
- How to make contact in relation to the use of Your Information
- If you have any questions or comments about this document, or wish to make contact in order to exercise any of your rights set out within it please contact:
 - Kats-Wills-and-Estate-Planning@outlook.com

You should also make contact with us as soon as possible on you becoming aware of any unauthorised disclosure of Your Information, so that we may investigate and fulfil our own regulatory obligations.

If you have any concerns or complaints as to how we have handled Your Information or Your Special Data and Criminal Disclosures you may lodge a complaint with the UK data protection regulator, the ICO who can be contacted through their website at <https://ico.org.uk/global/contact-us/> or by writing to Information Commissioner's Office, Wycliffe House, Water Lane, Wilmslow, Cheshire, SK9 5AF