

Estate Planning Solutions Privacy Policy

The type of personal information we collect

We currently collect and process the following information:

- Personal identifiers, contacts and characteristics (for example, name and contact details)
- Identification documents
- General financial information including type of financial assets owned and current values
- Names and addresses of those appointed by you in your Will and other associated documents

How we get the personal information and why we have it

Most of the personal information we process is provided to us directly by you for one of the following reasons:

- To satisfy ourselves of your identity and the identity of your Trustees (Lifetime Trusts).
- To satisfy the legal obligations we have in all Anti Money-laundering and Anti-Terrorism funding legislation.
- In order that we can provide the best, appropriate legal advice.
- In order that we can properly assess any liability to Tax you may have.

We may share this information with a Third party involved in the completion of your work; for example if we are asked to complete any reserved legal activity, which has to be completed by a regulated business.

Under the UK General Data Protection Regulation (UK GDPR), the lawful bases we rely on for processing this information are:

(a) Your consent. We will ask for your explicit consent at the start of the process with you.

You can remove your consent at any time. You can do this by contacting our GDPR officer at enquiries@estplan.co.uk. We will securely delete or return all relevant data unless we have an ongoing legal obligation to continue to hold Data

(b) We have a contractual obligation as stated in our Terms of Engagement. A copy of our standard Terms of Engagement is available to view on our website.

(c) We have a legal obligation – In most situations we have a legal obligation to continue to hold Data for our clients for a period of six years after your death. This enables the Company to appropriately respond to any claims made against us and to assist any interested parties in any action that may be brought post death.

(d) We have a vital interest

(f) We have a legitimate interest – from time to time the Company processes Data in a manner which enables the Company to provide information to you where the information is likely to be helpful to you and your estate planning objectives. For instance, if Tax or Trust legislation changes, we may communicate with you.

How we store your personal information

Your information is securely stored.

We keep Data on our CRM database which is hosted on secure servers. Any data originally held on paper, is scanned to your client record and the paper is securely disposed of (shredded) for. The Company has a robust IT security policy and regularly reviews and audits the security of its systems. All employees and self-employed consultants working with the Company are trained at induction on the subjects of UKGDPR and IT security and receive additional training at regular intervals whilst working with the Company.

Your data protection rights

Under data protection law, you have rights including:

Your right of access - You have the right to ask us for copies of your personal information.

Your right to rectification - You have the right to ask us to rectify personal information you think is inaccurate. You also have the right to ask us to complete information you think is incomplete.

Your right to erasure - You have the right to ask us to erase your personal information in certain circumstances.

Your right to restriction of processing - You have the right to ask us to restrict the processing of your personal information in certain circumstances.

Your right to object to processing - You have the the right to object to the processing of your personal information in certain circumstances.

Your right to data portability - You have the right to ask that we transfer the personal information you gave us to another organisation, or to you, in certain circumstances.

You are not required to pay any charge for exercising your rights unless such request is deemed as unreasonable. If you make a request, we have one month to respond to you.

Please contact us at enquiries@estplan.co.uk if you wish to make a request.

How to complain

If you have any concerns about our use of your personal information, you can make a complaint to us at enquiries@estplan.co.uk

You can also complain to the ICO if you are unhappy with how we have used your data.

The ICO's address:

Information Commissioner's Office
Wycliffe House
Water Lane
Wilmslow
Cheshire
SK9 5AF

Helpline number: 0303 123 1113

ICO website: <https://www.ico.org.uk>