



Data Protection and Privacy Statement

Introduction

Your personal data is data which by itself or with other data available to us can be used to identify you.

We are Heritage Law (Norwich) Ltd and our data controller is Dominic Pearson. He can be contacted at 13 Hellesdon Park Road, Drayton High Road, Norwich, NR6 5DR if you have any questions.

Where we are acting for two or more people, this statement applies to each person separately

Types of Personal Data We Collect and Use

We will collect personal data from you that is relevant to your matter only. We will not ask for any data that has no relevance to your matter.

We will collect most of the data from you directly although there will be occasions where we are provided data from our sister company, Heritage Will Writers, and other third party referrers. Any data that they supply us will only be provided and accepted with evidence of your consent.

The personal data we may collect and use, depending on your instructions, includes:

- Your full name and personal details including contact information (your address, email, telephone numbers)
- Your date of birth
- Details of your family members, for example if you are making a Will
- Detail about your estate, for example your assets and liabilities
- Names and addresses for any third party involved in your matter (for example, a co Trustee or Executor)
- Where necessary, your bank account details (for example, on the completion of a sale or if you are a beneficiary of an estate).

There may be occasion when we request additional data from you as part of your matter that is not covered by the above.

In line with our Data Protection Policy your data will be stored securely and we will notify you immediately of any breach arising from misuse of your data.



Providing Your Personal Data

Some of the data that we request you provide us will be optional, for example email addresses. You are under no obligation to provide us with this data if you so wish.

Other data must be provided as it is necessary to carrying out your instruction. If you do not wish to provide us with this we will be unable to continue acting for you. If there is any doubt as to whether the data you are being asked to provide is optional or not please contact the Data Controller.

Monitoring Communications

Subject to applicable laws we will save all correspondence, both email and physical, on your file. We will also keep notes of conversations that we have whether or not they are immediately relevant to your matter.

The reasons for this are to comply with our regulatory responsibilities and to ensure there is a clear record of your matter should this need to be relied upon in the future, for example if your Will is challenged or you have a dispute with us.

Using Your Personal Data

We will process your personal data:

1. As necessary **to perform our contract with you** for the matter you have instructed us
 - (a) To take steps at your request before entering into it;
 - (b) To decide whether to enter it;
 - (c) To manage and perform that contract;
 - (d) To update our record; and
 - (e) To trace your whereabouts to contact you should there be a need to do so, for example to recover a debt

2. As necessary **for our own legitimate interests**
 - (a) For good governance, accounting and managing and auditing our business operations;
 - (b) To monitor emails, calls and other communications with you;
 - (c) For market research, analysis and developing statistics;
 - (d) To send you marketing communications relevant to you and your matter.

3. As necessary **to comply with a legal obligation** for example



- (a) When you exercise your rights under data protection law and make requests;
- (b) For compliance with legal and regulatory requirements;
- (c) For establishment and defence of legal rights;
- (d) For activities relating to the prevention, detection and investigation of crime;

4. With **your consent**

You are free at any time to change your mind and withdraw your consent. This may mean we are unable to do certain things for you.

Sharing Your Personal Data

Subject to the applicable data protection law, we may share your personal data with:

- Heritage Will Writers or any other company that has referred to the work to us;
- Subcontractors and other persons who help us provide our services;
- Companies and other persons providing services to us;
- Our legal and other professional advisors, including our auditors and regulators
- Government bodies and agencies in the UK (for example HM Revenue and Customs or the DWP)
- Courts, to comply with the legal requirements and for the administration of justice;
- In an emergency to protect your vital interests;
- To protect the security and integrity of our business operations;
- To other parties connected with your matter;
- Should we sell or restructure our business or its assets or have a merger or re-organisation;
- Anyone else where we have your consent or where it is required by law.

Identity Verification

In line with our Anti Money Laundering policy if we are acting for you for the first time your personal data will be processed in order to carry out online verification checks. This is covered in more detail in our Letter of Engagement and Terms of Business.

Our Marketing

We will, from time to time, process your personal data to make contact with you about changes in the law or additional products that we think will be of relevance to you. We will use your home address and/or your email address (where provided) to contact you. In some circumstances it may be necessary to phone you.



If you do not wish to receive marketing material from us you can notify us at any time. If you do not wish to receive marketing material by a certain method you can notify us and we will update your preferences.

Retention Periods

We will retain your personal data for so long as is necessary in order to deal with your matter and for as long as you might legally bring claims against us.

The retention period specific to your matter will be confirmed at the conclusion of your instructions.

Your Rights Under Applicable Data Protection Law

Your rights are as follows (nothing that these rights don't apply in all circumstances and that data portability is only relevant from May 2018):

- The **right to be informed** about our processing of your personal data;
- The right to have your personal data **corrected if it's inaccurate** and to have **incomplete personal data completed**;
- The right to **object** to processing of your personal data;
- The right to **restrict processing** of your personal data;
- The right to **have your personal data erased** ("the right to be forgotten")
- The right to **request access** to your personal data and information about how we process it;
- The right to **move, copy or transfer your personal data** ("data portability"); and
- Rights in relation to **automated decision making** including profiling

You have the right to complain to the Information Commissioners Office. It has enforcement powers and can investigate compliance and data protection law: ico.org.uk