

## **How we will handle our client's personal data and protect their privacy.**

A guide to how we meet the requirements of the General Data Protection Requirements (GDPR)

Making sure that clients' personal data is secure and properly dealt with is of paramount importance in our dealings with clients. It is therefore important that clients understand what information we will hold, why we need it, and how we will use it.

### **What data will Stanford Legal Services require?**

We must fully understand a client's estate planning requirements; if we are to give them good advice, take appropriate actions and produce effective documents. We therefore need to obtain information about them, their families, their personal circumstances, and their objectives and preferences.

Some of the information will be private and may be sensitive, such as details of a client's assets, their relationships, their income and expenditure, their health, their debts and what they may inherit in the future. Where we provide estate planning services via 3<sup>rd</sup> party solicitors (such as inter vivos trusts and certain Land Registry applications) and document storage via providers such as The National Will Archive, then much of the information provided to us, may also be forwarded to these parties, either to enable them to undertake actions for the client or to safely store documents (which contain personal information) for them.

### **Do clients have to provide their personal data?**

If we do not have a complete picture of a client's assets, family circumstances and objectives, then we are unable to guarantee that the advice we may offer or that the documents we supply will be suitable for the client needs.

### **How will we use clients data?**

There are several reasons why we need to process clients personal data;

1. The primary reason is to allow us to do the job we've been asked to do. Specifically, we will use your data to:
  - Provide estate planning advice and offer options which are relevant to the client now, or may become relevant to them or their beneficiaries in the future.
  - To draft documents which the client has instructed
2. We may also use a client's personal data to:
  - Assist us in supplying copy documents to the client
  - Assist us in producing amended documents when this is requested by the client
3. We may also process client's personal data for our own legitimate interests. Typically, these would be limited to:
  - Analysing our business for trends and researching how we can improve our services;

- Reviewing the work that we have carried out for clients to ensure we have met the requirements of The Society of Will Writers Code of Practice.
- Assisting us to exercise or defend legal challenges in the future.

### **How long will Stanford Legal Services store data?**

We will only keep personal information for as long as is necessary. How long that is depends on the type of data and the nature of the work we have carried out. In most cases, personal data will be stored indefinitely as we need to keep evidence that we have fulfilled our legal obligations.

### **Can I see a copy of my personal data?**

Yes. Please write to our Data Controller (details below) and we will provide a copy of any personal data we hold about you within one calendar month of receiving your request. Please note that we may need to verify your identity before providing the information.

### **What if data is incorrect or incomplete?**

You have the right to have your data corrected or completed by contacting our Data Controller in writing (details below). Please be aware that we need to maintain records of information as it was at the time of the advice or the transaction taking place.

### **Can I have my data erased?**

If we have provided you with advice or processed a transaction on your behalf, we will not normally be able to erase your personal data. This is because we are obliged to maintain records of our advice and transactions in case we need to exercise or defend legal claims in future.

### **Who is Stanford Legal Services Data Controller?**

Our Data Controller is:

Paul Stanford  
Stanford Legal Services  
23 Nautilus, Marine Parade, Worthing BN11 3PR  
paul@stanfordlegal.co.uk

Stanford Legal Services is the trading name of 4 Momentum Limited and our registration number on the Information Commissioner's Office register is ZA361629.

### **If you'd like to make a complaint about how we have handled your personal data...**

...please write in the first instance to The Data Controller at the above address.

If you are not satisfied with the Data Controller's response, you can make a complaint to:

Information Commissioner's Office, Wycliffe House, Water Lane, Wilmslow, Cheshire, SK9 5AF  
Telephone: 0303 123 1113 (local rate) or 01625 545 745 (national rate)  
Or online <https://ico.org.uk/concerns/>