

Privacy Policy



LEGACY LAW

PROTECTING YOUR LEGACY

PRIVACY POLICY

We take your privacy very seriously. Please read this privacy policy carefully as it contains important information on who we are and how and why we collect, store, use and share your personal data. It also explains your rights in relation to your personal data and how to contact us or supervisory authorities in the event you have a complaint.

When we use your personal data we are regulated under the General Data Protection Regulation (GDPR) which applies across the European Union (including in the United Kingdom) and we are responsible as 'controller' of that personal data for the purposes of the GDPR. Our use of your personal data is subject to your instructions, the GDPR, other relevant UK and EU legislation and our professional duty of confidentiality.

Key terms

We, us, our	Legacy Law Limited
Our data protection officer	Catherine Whitaker Catherine can be contacted at catherine@legacy-law.co.uk or on 0118 40 50 131
Personal data	Any information relating to an identified or identifiable individual
Special category personal data	Personal data revealing racial or ethnic origin, political opinions, religious beliefs, philosophical beliefs or trade union membership Genetic data Biometric data (where used for identification purposes) Data concerning health, sex life or sexual orientation

Personal data we collect about you

The table below sets out the personal data we will or may collect in the course of providing legal services. This may include special category personal data.

When do we collect personal data	Personal data we may collect
If you complete the contact form on our website (www.legacy-law.co.uk)	We may collect your contact details and any other information you provide to us
If you contact us by telephone, email, or by post	We may keep a record of that contact and the information you provide to us at that time
If you instruct us to provide you with legal services	We will collect a range of information relating to you which allows us to provide you with the services you have requested, this will include special category personal data to enable us to fulfil our obligations to you

If you complete a legal matter with us, we will ask you complete a feedback form	We will collect your contact details and any other information you provide on that form
If you complete the contact form on our website, we will ask you if you wish to be added to our marketing database	If you request to be added to our marketing database, we will collect your name and contact details, together with any other information you have provided and we will use this information to contact you in future about news, products, or services. You can opt out at any time.
If you visit our website	<p>We will collect information about your visit, your address, traffic data, location data, and the resources that you access</p> <p>Our website has a limited number of cookies. For more information about the cookies we use on our website, please see our cookies policy which is available at our website – www.legacy-law.co.uk</p>

This personal data is required to enable us to provide legal services. If you do not provide personal data we ask for, it may delay or prevent us from providing those services.

How your personal data is collected

We collect most of this information from you direct. However, we may also collect information:

- from publicly accessible sources, e.g. Companies House or HM Land Registry;
- from a third party with your consent, e.g.:
 - your bank or building society, another financial institution or advisor;
 - consultants and other professionals we may engage in relation to your matter;
 - your employer and/or trade union, professional body or pension administrators;
 - your doctors, medical and occupational health professionals;
 - your proposed attorneys, or other friends and family members if you have expressly requested that we do this in relation to your matter.
- via our website—we use cookies on our website (for more information on cookies, please see our cookie policy which is available on our website at www.legacy-law.co.uk)
- via our information technology (IT) systems, e.g.:
 - case management, document management and time recording systems;
 - automated monitoring of our websites and other technical systems, such as our computer networks and connections, communications systems and email.

How and why we use personal data

Under data protection law, we can only use personal data if we have a proper reason for doing so, e.g.:

- to comply with our legal and regulatory obligations;
- for the performance of our contract with you or to take steps at your request before entering into a contract;
- for our legitimate interests or those of a third party; or
- where you have given consent.

A legitimate interest is when we have a business or commercial reason to use personal data, so long as this is not overridden by your own rights and interests. The table below explains how we use personal data and our reasons for doing so:

How data is processed	Lawful basis for processing your data
To register you as a new client and provide you with legal services	For the performance of our contract with our client or to take steps at our client's request before entering into a contract
To perform contractual obligations for you or to comply with statutory, professional or regulatory obligations	For compliance with our legal, professional and regulatory obligations
To complete operational procedures, such as improving efficiency, training and quality control	For our legitimate interests so we can be as efficient as can be to deliver the best service for you at the best price
To manage our relationship with you, for instance, updating you about policy changes or asking for feedback on our services	For performance of our contract with you, to comply with our legal obligations, and to protect our legitimate interests (for instance, to ensure our records are up-to-date, and that we understand how we can provide services to you in the most efficient manner)
To administer and protect our business as well as our website	For our legitimate interests so we can ensure that our business and systems are robust and efficient (this includes maintenance, troubleshooting, data analysis testing, and system maintenance), and also to comply with our statutory obligations
To assess our data content so we can ensure we are delivering helpful information to clients through our website, publications, and marketing strategies	For our legitimate interests – so we can understand how our clients use our services and what developments clients want for the future provision of services, to nurture our business and inform our marketing strategy

How data is processed	Lawful basis for processing your data
To use data analytics to improve our website, services, marketing, and client interaction	For our legitimate interests, to understand our clients and what they need, improve our website offering, and develop products and services for clients
To update you about legal developments that may be of interest, and recommend services that might assist you	For our legitimate interests, so we can expand our services and systems and business
To respond to a specific query you have made to us	With your explicit consent, to contact you so we can assist you with your query, thus fulfilling a legitimate interest
To complete external audits and quality checks	For our legitimate interests, so we may maintain and attain accreditations and demonstrate our high standards, and also to comply with our legal and regulatory obligations

How and why we use special category personal data

Under data protection law, we can only use special category personal data where:

- we have a proper reason for doing so (see above: **How and why we use personal data**),
- AND
- one of the 'grounds' for using special category personal data applies

There are ten potential grounds for using special category personal data under data protection law. Generally, where we use special category personal data, we will do so on the ground that this is necessary for establishing, exercising or defending legal claims. This includes using special category personal data, where necessary, for:

- actual or prospective court proceedings;
- obtaining legal advice; or
- establishing, exercising or defending legal rights in any other way.

Where this does not apply, we will seek explicit consent to process special category personal data.

Promotional communications

We may use your personal data to send you updates (by email, telephone or post) about legal developments that might be of interest to you and/or information about our services, including exclusive offers, promotions or new services or products.

We have a legitimate interest in processing your personal data for promotional purposes (see above '**How and why we use your personal data** '). This means we do not usually need your consent to

send you promotional communications. However, where consent is needed, we will ask for this consent separately and clearly.

We will always treat your personal data with the utmost respect and never sell or share it with other organisations for marketing purposes.

You have the right to opt out of receiving promotional communications at any time by contacting us by email at catherine@legacy-law.co.uk.

We may ask you to confirm or update your marketing preferences if you instruct us to provide further services in the future, or if there are changes in the law, regulation, or the structure of our business.

Who we share your personal data with

We routinely share personal data with:

- professional advisers who we instruct on your behalf or refer you to, e.g. barristers, medical professionals, accountants, tax advisors or other experts;
- other third parties where necessary to carry out your instructions, e.g. the Office of the Public Guardian when registering a power of attorney;
- our insurers and brokers;
- external auditors, e.g. in relation quality marks or accreditations and the audit of our accounts;
- our bank; and
- external service suppliers, representatives and agents that we use to make our business more efficient, e.g. typing services, marketing agencies, document collation or analysis suppliers.

We only allow our service providers to handle your personal data if we are satisfied they take appropriate measures to protect your personal data. We also impose contractual obligations on service providers to ensure they can only use your personal data to provide services to us and to you.

We may disclose and exchange information with law enforcement agencies and regulatory bodies to comply with our legal and regulatory obligations.

We may also need to share some personal data with other parties, such as potential buyers of some or all of our business or during a re-structuring. Usually, information will be anonymised but this may not always be possible. The recipient of the information will be bound by confidentiality obligations.

We will not share your personal data with any other third party.

Where your personal data is held

Information may be held securely at our offices and those of our third party agencies, service providers, representatives and agents as described above (see '**Who we share your personal data with**').

How long your personal data will be kept

We will keep your personal data after we have finished advising or acting for you. We will do so for one of these reasons:

- to respond to any questions, complaints or claims made by you or on your behalf;
- to show that we treated you fairly;
- to keep records required by law

We will not retain your data for longer than necessary for the purposes set out in this policy. Different retention periods apply for different types of legal matter:

Type of data	Retention period
Information relating to your Will matter	<p>Until 15 years after your death (if notified of it). If not so notified, indefinitely. This is because claims against estates have to be made within 12 years of death, and 15 years is the s.14A Limitation Act longstop period.</p> <p>For Wills prepared for a couple, the retention period will start at the date of the second death (or when we become aware of the death).</p> <p>If the Will contains a life interest trust, the Will information will be retained until the death of the life tenant plus 15 years.</p> <p>If the Will contains a discretionary trust, the Will information will be retained for the perpetuity period of 125 years as set by the Perpetuities and Accumulations Act 2009, or 15 years after being notified that the trust has been wound up.</p>
Information relating to your powers of attorney matter	<p>Until 15 years after your death (if notified of it). If not so notified, the file will be retained indefinitely.</p>
Information relating to your deed of variation matter	<p>For 15 years, because 15 years is the s.14A Limitation Act longstop period.</p>

When it is no longer necessary to retain your personal data, we will delete or anonymise it.

Transferring your personal data out of the UK and EEA

We will not transfer your personal data outside of the European Economic Area or to any organisation (or subordinate bodies) governed by public international law or which is set up under any agreement between two or more countries.

Your rights

You have the following rights, which you can exercise free of charge:

Access	The right to be provided with a copy of your personal data (commonly known as a 'data subject access request')
Rectification	The right to require us to correct any mistakes in your personal data
To be forgotten	The right to require us to delete your personal data—in certain situations
Restriction of processing	The right to require us to restrict processing of your personal data—in certain circumstances, e.g. if you contest the accuracy of the data
Data portability	The right to receive the personal data you provided to us, in a structured, commonly used and machine-readable format and/or transmit that data to a third party—in certain situations
To object	The right to object: —at any time to your personal data being processed for direct marketing (including profiling); —in certain other situations to our continued processing of your personal data, e.g. processing carried out for the purpose of our legitimate interests.
Not to be subject to automated individual decision making	The right not to be subject to a decision based solely on automated processing (including profiling) that produces legal effects concerning you or similarly significantly affects you

For further information on each of those rights, including the circumstances in which they apply, please contact us or see the [Guidance from the UK Information Commissioner's Office \(ICO\) on individuals' rights under the General Data Protection Regulation](#).

If you would like to exercise any of those rights, please:

- email, call or write to us—see below: '**How to contact us**'; and
- let us have enough information to identify you (e.g. your full name, address and matter reference number);
- let us have proof of your identity and address (a copy of your driving licence or passport and a recent utility or credit card bill); and
- let us know what right you want to exercise and the information to which your request relates.

Keeping your personal data secure

We have appropriate security measures to prevent personal data from being accidentally lost, or used or accessed unlawfully. We limit access to your personal data to those who have a genuine business need to access it. Those processing your information will do so only in an authorised manner and are subject to a duty of confidentiality.

We also have procedures in place to deal with any suspected data security breach. We will notify you and any applicable regulator of a suspected data security breach where we are legally required to do so.

If you want detailed information from Get Safe Online on how to protect your information and your computers and devices against fraud, identity theft, viruses and many other online problems, please visit www.getsafeonline.org. Get Safe Online is supported by HM Government and leading businesses.

How to complain

We hope that we can resolve any query or concern you may raise about our use of your information. Please contact us in the first instance if you have any concerns.

The [General Data Protection Regulation](#) also gives you right to lodge a complaint with a supervisory authority, in particular in the European Union (or European Economic Area) state where you work, normally live or where any alleged infringement of data protection laws occurred. The supervisory authority in the UK is the Information Commissioner who may be contacted at <https://ico.org.uk/concerns> or telephone: 0303 123 1113.

Changes to this privacy policy

This privacy policy is effective from 18th December 2020. We may change this policy from time to time and the most up to date version will always be available on our webpage (www.legacy-law.co.uk) or you can request a copy by contacting us (see below).

How to contact us

Please contact us by post, email or telephone if you have any questions about this privacy policy or the information we hold about you.

Our contact details are shown below:

Our contact details
Legacy Law Limited, 307 Reading Road, Winnersh, Wokingham, Berkshire, RG41 5LR
catherine@legacy-law.co.uk
0118 40 50 131

Do you need extra help?

If you would like this policy in another format (for example audio, large print, braille) please contact us (see 'How to contact us' above).