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## Dynasty Wills and Estate Planning Privacy Policy

### The type of personal information we collect

We currently collect and process the following information:

- Full name
- Date of birth
- Address
- Contact number
- Email

## 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 create a case file
- To draft your Will(s)
- To draft your LPA(s)
- To process payment for our services

We also receive personal information indirectly, from the following sources in the following scenarios:

- If you have been referred by a third party, such as your mortgage broker or your accountant.

We do not share this information with any other organisation.

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

- (a) Your consent. You are able to remove your consent at any time. You can do this by contacting us.**
- (b) We have a contractual obligation.**
- (c) We have a legal obligation.**
- (d) We have a legitimate interest.**

## How we store your personal information

Your information is securely stored using our digital case management system.

We keep your personal information for 7 years. We will then dispose your information by deleting your details permanently from our case management systems and destroying any tangible materials containing your personal details.

## 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. If you make a request, we have one month to respond to you.

Please contact us 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 [info@dynastywills.co.uk](mailto:info@dynastywills.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>