

## **WMS Privacy Notice**

### ***Who are we?***

Wills Made Simple (“WMS”) is the business trading name of Andrew Stephen Spinelli LLB, MSWW who is a “controller” of data under the General Data Protection Regulation (“GDPR”).

### ***What information is collected from you?***

Only information that is relevant to the matter(s) being dealt with will be collected from you. The following information which is defined as “personal data” will typically be collected in order to carry out your instructions:

1. Personal details/contact information
2. Family, lifestyle & social circumstances
3. Financial details (assets/income/liabilities/taxation)
4. Business activities

Information classified as being in a “special category” may also be collected, which might include:

5. Physical/mental health details
6. Race/ethnicity
7. Religion
8. Sexual orientation

### ***How will we use your information?***

We will use your information solely in the provision of our services to you, in order to advise you and act on your behalf. It will be routinely used in communications with you which are incidental to our services and may be used if we should receive a complaint. We will not send you any unsolicited marketing material nor information about any other services or products, unless you have expressly agreed to this.

### ***Lawful basis of processing***

We will collect, collate, use and store your information only because it is necessary to carry out our obligations to provide our service to you (the performance of our contract) and after the contract has been performed in order to archive your file papers. The information collected from you may be relevant in the event of a dispute about your estate (if say your Will is challenged) and therefore we do not apply a 6 year limit to storage of your information as we consider we have a legitimate interest to protect (both to you or to us) in the future retrieval and use of your file information.

### ***Who will we share your information with?***

Unless we are legally obliged to do otherwise, your information will only be shared with other people when you have given us explicit permission, for example you may have agreed that we may pass your details to a third party in connection with storage of your Will or other legal documents or recording the making of your Will on a database (Certainty National Will Register) or on a referral to an Accountant or Financial Advisor etc., for taxation or investment advice. We will continue to process your information on this basis until you withdraw your consent or it can reasonably be assumed that your consent has lapsed. You can withdraw your consent to such sharing at any time.

### ***Your rights***

You have the right under the GDPR to see personal data held about you and you may contact us to request this. You may send your request to [andrewspinelli@btinternet.com](mailto:andrewspinelli@btinternet.com)

You have the right to have any records corrected that are wrong.

At all times you have the right to report any concerns or lodge a complaint with the Information Commissioner's Office (ICO – Tel 0303 123 1113) and any concerns may also be referred to the Society of Will Writers for investigation pursuant to their Client Charter.

***Taking your Privacy Seriously***

Your instructions to us and all of your personal data (special category or otherwise) are entirely confidential.

We undertake to preserve the confidentiality of all information you provide to us unless compliance with a statutory obligation makes this impossible – for example we may be obliged to surrender information to legal or tax authorities who have a court order/warrant.

When we receive a request from you to access, see, edit or delete personal data we will first take steps to verify your identity before any such request is acted upon. This is important to safeguard the integrity of your information.

We do not process your personal data for any purposes which have not been set out already in this Notice.

We do not sell on your data and it will never be used for telemarketing purposes.

We will only ever contact you when necessary, in order to progress your instructions, or when you have requested that we do so.

We will do our best to ensure that the information we hold about you is both accurate and up-to-date as well as being as secure as possible and not disclosed nor accessed by any unauthorised third party.

If you visit our website, when you first do so, we promise to alert you to the presence of any “cookies”, and you will be able to choose not to accept them.

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Wills Made Simple

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