



TRF Wills Privacy Policy

Personal Data

In the EU's General Data Protection Regulation (GDPR), Personal Data is defined as "...any information relating to an identified or identifiable natural person ("data subject"). An identifiable person is one who can be identified, directly or indirectly, by reference to **an identifier** such as a name, an identification number, **location data**, online identifier or to one or more factors specific to the physical, physiological, **genetic**, mental, economic, cultural, or social identity of that person."

How we use your Information

The following privacy policy will outline how **TRF Wills** will collect and use your data. This is done so that we can:

- Take your Will Instructions; and
- Generate your Draft Wills; and
- Amend your Draft Wills as a Result of your Feedback; and
- Generate your Final Will Documents; and
- Take your Lasting Power of Attorney (LPA) Instructions; and
- Generate LPA documents; and
- Take Relevant Deceased Person & Estate Details to Provide Effective Probate Guidance; and
- Provide Accurate Receipts for Fee Payments to TRF Wills; and
- Store Documents for Clients as and when required.

Why do we need to Collect and Store personal data?

For us to undertake any of the above, we must collect and store your data firstly for correspondence purposes. We will ensure that the information collected will only be used for its intended purpose and does not constitute an invasion of your privacy.

TRF Wills may wish to contact you for marketing purposes, however we would contact you for additional consent for that purpose if not already given.

Will we share your personal data with anyone else?

We may need to pass your details onto third parties who are either contracted to, or part of the **TRF Wills** group of companies. Any third parties who we do pass your details onto are obliged to store

your details securely and only process them if responding to **Will Document Production, LPA Document Production and/or Probate Guidance** on our behalf. When the time comes that they no longer require your personal data, they will dispose of this accordingly and in line with our company policy. If we wish to pass your personal data to a third party, we will only do so with your explicit consent, unless we are legally obliged to do so otherwise.

How will we use the personal data we Collect about you?

Processing data constitutes as collecting, storing, and using. We will process this data in accordance with the GDPR. We will do our utmost to keep your information accurate and up to date and not keep it longer than is necessary. **TRF Wills** may issue occasional reminders to all customers to keep their contact details up to date and will update them accordingly. Please be advised that there is information that we are required to keep in accordance with the law, such as information needed for tax and audit purposes. Personal data may be held for longer than these periods, however this will depend on the individual needs of the company.

Under what Circumstances will we contact you?

We will only ever contact you when necessary, or when you have requested that we do so. We do not mean at any point to be intrusive or ask for unnecessary information. We will do our best to ensure that the information we hold is as secure as possible to minimize the risk of unauthorised access or disclosure. **TRF Wills** store all client files in a locked cabinet within an office within a private residence, so that there is no risk of public access to your personal information. All official documents are stored within a secure waterproof & fireproof container.

Can you find out about the personal data that we hold about you?

If you want to see what personal data we hold on you and how it is processed, you may contact us to request this. This is known as a Data Subject Access Request (DSAR) and you must request this in writing (either by post or email), providing the necessary identification before any information is released. If **TRF Wills** do store any of your personal data, you may request information on the following:

- Identity and contact details of the person or organization that has determined how and why to process your data. In some cases, this will be a representative in the EU; and
- Contact details of the GDPR owner, where applicable; and
- The purpose of the processing as well as the legal basis for processing; and
- If the processing is based on the legitimate interests of TF Wills, The Society of Will Writers (SWW) or a third party, information about those interests; and
- The categories of personal data collected, stored and processed; and
- Recipient(s) or categories of recipients to whom that data is/will be disclosed; and
- If we intend to transfer your personal data to a third-party country or international organization, information about how we ensure this is done securely. The EU has approved sending personal data to some countries because they meet a minimum standard of data protection. In other cases, we will ensure there are specific measures in place to secure your information; and
- How long the data will be stored; and

- Details of your rights to correct, erase, restrict or object to such processing; and
- Information about your right to withdraw consent at any time; and
- How to lodge a complaint with the supervisory authority; and
- Whether the provision of personal data is a statutory or contractual requirement, or a requirement necessary to enter a contract, as well as whether you are obliged to provide the personal data and the possible consequences of failing to provide such data; and
- The source of personal data if it wasn't collected directly from you; and
- Any details and information of automated decision making, such as profiling, and any meaningful information about the logic involved, as well as the significance and expected consequences of such processing.

What forms of ID will you need to provide to access this?

TRF Wills will accept the following forms of ID when information on your personal data is requested: Passport; Photo Driving Licence; Utility Bill (from the last three months); Notarised ID Document.

Contact details of the GDPR Owner

If you wish to submit a DSAR, or have any questions regarding this privacy statement, you must do so in writing using the following information:

TRF Wills, Chapelhayes, Threshers, Crediton, Devon, EX17 3NR; and/or

Email: info@trfwills.co.uk; and/or

Telephone: (01392) 949003.

Thank you.