



HALL & ASSOCIATES

## **This Privacy Notice explains how we use any personal information we collect about you.**

### **What information do we collect about you?**

We collect information about you when you engage us for estate planning services. This information will relate to your current Wills, Lasting Powers of Attorney, Trusts and current financial circumstances.

### **Why do we need to collect and use your personal data?**

The primary legal basis that we intend to use for the processing of your data is in order to obtain estate planning advice from Countrywide Tax and Trust Corporation Ltd. and thereafter to draft your legal documents using their software and processes.

The information that we collect about you is essential for us to be able to carry out the services that you require from us effectively. Without collecting your personal data we'd also be unable to fulfil our legal obligations.

We may need to verify your identity before undertaking some specialist trust and conveyance work conducted by Countrywide Tax and Trust Corporation Ltd for you.

### **How will we use the information about you?**

We collect information about you in order to provide you with the services for which you engage us.

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

We won't share your information for marketing purposes with any other companies.

In order to deliver our services to you effectively we may send your details to third parties, specifically Countrywide Tax and Trust Corporation Ltd. and we will provide you with their terms and conditions in advance of any estate planning advice being acted upon

Where third parties are involved in processing your data we'll have a contract in place with them to ensure that the nature and purpose of the processing is clear, that

they are subject to a duty of confidence in processing your data and that they'll only act in accordance with our written instructions.

Where it's necessary for your personal data to be forwarded to a third party we'll use appropriate security measures to protect your personal data in transit.

### **How long do we keep hold of your information?**

In principle, your personal data shouldn't be held for longer than is required under the terms of our contract for services with you.

You have the right to request deletion of your personal data. We'll comply with this request, subject to the restrictions of our legal obligations and legitimate interests as noted above.

### **How can I access the information you hold about me?**

You have the right to request a copy of the information that we hold about you. If you'd like a copy of some or all of your personal information please email or write to us using the contact details noted below.

When your personal data is processed by automated means you have the right to ask us to move your personal data to another organisation for their use.

We have an obligation to ensure that your personal information is accurate and up to date. Please ask us to correct or remove any information that you think is incorrect.

### **Other websites**

Our website does not contain links to other websites and so this privacy policy only applies to this website.

### **What can you do if you are unhappy with how your personal data is processed?**

You also have a right to lodge a complaint with the supervisory authority for data protection. In the UK this is:

Information Commissioner's Office  
Wycliffe House  
Water Lane  
Wilmslow  
Cheshire  
SK9 5AF  
0303 123 1113 (local rate)

## **Changes to our privacy policy**

We keep our privacy policy under regular review and we'll inform you of any changes when they occur.

## **How to contact us**

Please contact us if you have any questions about our privacy policy or information, we hold about you: In writing to Hall and Associates, 3 Cogdean Close, Corfe Mullen, Dorset, BH21 3XA

Hall and Associates is the trading style of Interact Management Solutions Ltd