

Privacy Notice

- JP ESTATE PLANNING LIMITED is registered in England. Registered address –
1 Whittle Court, Knowlhill, Milton Keynes, MK5 8FT. Company number 09924711.
- JP ESTATE PLANNING LIMITED's permitted business is advising on or
drafting legal documentation.

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 / legal services. This information will relate to your personal and financial circumstances. It may also include special categories of personal data such as data about your health, if this is necessary for the provision of our services.

We may also collect information when you voluntarily complete client surveys or provide feedback to us.

Information about connected individuals

We may need to gather personal information about your close family members and dependants in order to provide our service to you effectively. In such cases it will be your responsibility to ensure that you have the consent of the people concerned to pass their information on to us.

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 for the performance of our contract with you. 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 would also be unable to fulfil our legal obligations.

Where special category data is required we will obtain yours or your attorneys' explicit consent in order to collect and process this information.

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?

In order to deliver our services to you effectively we may send your details to third parties such as those that we engage for professional compliance, accountancy or legal services. Where it is necessary to send your personal data to third parties to comply with the contract we confirm that that these third parties will have confirmed their compliance with the GDPR.

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

To fulfil our obligations in respect of prevention of money-laundering and other financial crime we may send your details to third party agencies for identity verification purposes.

How long do we keep hold of your information?

During the course of our relationship with you we will retain personal data which is necessary to provide services to you. We will take all reasonable steps to keep your personal data up to date throughout our relationship.

We reserve the right to retain data for as long as is required thereafter where we believe it is in our legitimate interests to do so.

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

How can I access the information you hold about me?

Your rights under the Data Protection Act are as follows:

1. The right to be informed
2. The right of access
3. The right to rectification
4. The right to erasure
5. The right to restrict processing
6. The right to data portability
7. The right to object
8. Rights in relation to automated decision making and profiling

Please note that you have the right to request the above, however, when we receive your request we may object to your request if we do not agree with it. We will however inform you if the request has been granted or not.

You have the right to request a copy of the information that we hold about you. If you would like a copy of some or all of your personal information please email our Data Protection Officer on

hello@jpestateplanning.co.uk or write to us using the contact details noted below. You will be required to complete a Subject Access Request form and provide us with proof of your identity in order for us to comply with your request and depending on the work involved a charge might be made.

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.

Marketing

From time to time we may need to contact you in regards to changes in legislation in order to ensure that your estate planning / legal services remain effective.

If you consent, we may also email you about other products or services that we think may be of interest to you. If you have agreed to receive marketing information, you may opt out at a later date.

You have a right at any time to stop us from contacting you for marketing purposes. If you no longer wish to be contacted for marketing purposes, please contact us by email or post.

We will not share your information for marketing purposes with other companies.

Cookies

We use cookies to track visitor use of the website and to compile statistical reports on website activity.

For further information visit <http://www.allaboutcookies.org/>

You can set your browser not to accept cookies and the above website tells you how to remove cookies from your browser. However in a few cases some of our website features may not function as a result.

Other websites

Our website contains links to other websites. This privacy policy only applies to this website so when you link to other websites you should read their own privacy policies.

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

Changes to our privacy policy

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

This privacy policy was last updated on 21nd May 2018.

How to contact us

Please contact us if you have any questions about our privacy policy or information we hold about you:

by email at hello@jpestateplanning.co.uk

Or write to us at:

JP ESTATE PLANNING Ltd, 1 Whittle Court, Knowlhill, Milton Keynes, MK5 8FT.