POSSIBLE PRIVACY NOTICE FOR USE IN ADMINISTRATION OF TRUSTS

Who are we?

We are Wansbroughs and we act for the executors/trustees of [ ] deceased.

The trustees are:

- [Names of executors/trustees]

We and the trustees are each holding personal data about you. We are sending you this notice to explain how and why your personal data will be used and for how long it will usually be retained. It provides you with certain information that must be provided by us under the General Data Protection Regulation ((EU) 2016/679) (GDPR).

If you have any queries or want any further information please contact:

- Name of fee earner
- Address of firm

We will comply with data protection law and principles (available on our website)

Why are we holding personal data about you and what will we do with it?

The trustees of [ ] are under a legal obligation to administer the Trust/the Settlement.

We and the executors/trustees will only use the information we collect to satisfy that legal obligation.

What sort of data do we hold and where does it come from?

While administering the Trust/the Settlement of [ ] we will collect, hold and use the following categories of information about you:

- Information provided by the settlor in correspondence and interviews which was used to establish the Trust/the Settlement and recorded in attendance notes;
- Information you provide during the administration;
- Information from bankruptcy search providers and genealogists;
- Information from publicly accessible sources such as the register of births, deaths and marriages, the Land Charges Registry.

Sensitive personal information

We may collect, store and use sensitive personal information to help us comply with the terms of the Trust/the Settlement and the wishes of the settlor (if applicable) and to enable us to identify and protect your rights as a beneficiary.

Who will we share your data with?

We will only share your data with the third parties where it is necessary to do so in order to properly administer the estate. This is likely to be government agencies such as HMRC and the Probate Registry and professionals providing services to the estate such as accountants, bankruptcy search providers and genealogists.

We will/may also share limited data with other beneficiaries to the extent necessary to explain how the assets of the Trust/the Settlement have been distributed.

We require third party service providers to take appropriate security measures to protect your personal data. We only allow them to use the data for specified purposes in accordance with our instructions. We do not permit them to use your personal data for their own purposes.

How long will you keep my personal data for?

We have to keep all the information relating to the administration for as long as there may be legal challenges to the way in which the Trust/the Settlement was administered. After the expiry of that period we will securely destroy the data in accordance with the statutory requirements.

Right to withdraw consent

You have the right to withdraw your consent for processing at any time. To withdraw your consent, please contact the DPO in writing. Once we have received notification that you have withdrawn your consent, we will no longer process your application and, subject to our retention policy, we will dispose of your personal data securely.

Contact

If you want to review, verify, correct or request erasure of your personal information, or object to the processing of your personal data, please contact The Data Protection Officer ("DPO"), namely Philip Wigg of Wansbroughs LLP, Northgate House, Devizes, Wiltshire SN10 1JX in writing.

Complaints procedure

You have the right to make a complaint at any time to the Information Commissioner's Office (ICO), the UK supervisory authority for data protection issues. However, you should raise any complaint with the DPO in writing in the first instance.

Privacy policy

For full details of our privacy policy and your rights see the statement on our website www.wansbroughs.com.