

## Stonehouse Legal Services- Privacy Policy

General Data Protection Regulations, ( known as GDPR) effective from 25<sup>th</sup> May 2018, require us to gain a client's written consent, for us to be able to continue to hold their personal data on file for the purposes of Wills, Powers of Attorney etc., and the other services we provide, and, to be able to communicate with clients in the future.

### What does GDPR do?

Primarily this is an improvement to the legal requirements of data holders and processors to protect personal information on any living person, that they hold or process. There are severe potential financial penalties if they are not followed, and persons have enhanced rights under the new rules. Organizations must ensure data is kept securely, for lawful purposes only, and data breaches must be reported immediately. GDPR contains a series of new rights, the main ones are:

- A person's right to access data, and be informed about what and why data is processed by an organisation
- A person's right to rectification if data is incorrect, including erasure, in full or in part
- A person's right to restrict use of data, portability and to be able to object

### How does GDPR affect your relationship with Stonehouse Legal Services?

We are registered with the Information Commissioners Office (the ICO). Data gathered regarding client's personal situations, including names, addresses, dates of birth and contact details for their Executors, Trustees, Beneficiaries, Attorneys etc is necessarily gathered for the lawful purpose of providing legal services including Wills, Lasting Powers Of Attorney, Tenancy Severance, Will Storage, Funeral Plans and Probate.

Will Storage, Funeral Plans and Probate services are provided by other organizations recommended by and linked to the Institute of Professional Willwriters. Your written consent is required before we may pass any information to any of these organizations.

**Please note:** Where data and information is gathered regarding construction of a will, we are required to keep records for a maximum of 6 years after the person has died, as both the willwriters, witnesses, and other persons could be called to court to provide evidence, if for example, a will is challenged.

### **For Stonehouse Legal Services, the following policies, procedures and practices are in place to protect client's personal data:**

- Any data held electronically regarding any 'live case' (ie being processed) is held securely using password-protected memory systems. Paper-based information is only used at client's homes to record information and is then transferred and recorded electronically within 24 hrs.
- Any temporary paper records/files are held securely in locked safes until they are shredded to ensure that the risk to client data is eliminated.
- Any data and all documents regarding clients and relevant other persons (e.g. Executors, Attorneys etc.) is held on secured servers operated by the company Willsuite.co.uk who provide both the software and electronic data storage. This is an online system so data is not stored on any computers operated by Stonehouse Legal Services. This minimizes our exposure to data misuse or theft.
- Once cases are 'completed' (e.g. a will is finalized and sent for storage), there are no paper-based records. Stonehouse Legal Services do not permanently store wills or any other paper-based documentation.

- Contact information (only) is held on password-protected memory systems.

Clients can withdraw or change their consent at any time by contacting us. Please note that all processing of data will cease once a client has withdrawn consent, other than where this is required by law, but this will not affect any personal data that has already been processed prior to that point.

**If you have any questions regarding this please contact John Wilford at Stonehouse Legal Services on 07553-789-665 or email [stonehouselegal@gmail.com](mailto:stonehouselegal@gmail.com), or write to us at: 65, Stonehouse Lane, Coventry CV3 4EH.**