

## LODGE BROTHERS LEGAL SERVICES LTD. PRIVACY NOTICE

Lodge Brothers Legal Services Ltd. (We) are committed to respecting and protecting your privacy. Our registered office address is Ludlow House, Ludlow Road, Feltham, Middlesex TW13 7JF. We are registered with the Information Commissioner's Office under registration no. ZA192933. We are regulated by the Solicitors Regulatory Authority under registration no. 629712.

### WHAT THIS PRIVACY NOTICE IS FOR

This policy is intended to provide information about how we will use (or "process") personal data about our clients or prospective clients. This information is provided because Data Protection Law gives individuals rights to understand how their data is used.

### INFORMATION WE MAY COLLECT FROM YOU

When we are instructed to act for you in relation to a matter or you ask us to provide an estimate we will ask you for some or all of the following information: your name, email, address, telephone number, date of birth, passport, driving licence, National Insurance number, tax reference number, proof of address documents and bank details. We may also ask you to provide this information on behalf of family members or friends of yours such as the names, addresses and dates of birth of the people that you wish to appoint as your Executor under a Will or Attorneys under a Lasting Power of Attorney. We will require this information in order to carry out our obligations arising from any contract entered into between you and us, to provide you with the information and services that you request from us and to inform you of other services we offer that are similar to those you have already used or enquired about. We will obtain this information from you in person, via email, correspondence or telephone. We may obtain your name, email address or telephone number from information that you have provided to Lodge Brothers whilst arranging a funeral or enquiring about or taking out a pre-paid funeral plan where you have requested to be contacted by Lodge Brothers Legal Services.

### LAWFUL BASIS FOR THE PROCESSING

To use your personal information we rely on four main reasons as follows:

1. Contract: we require your personal data in order to perform our obligations under our contract with you. For example we need your date of birth to complete your Lasting Power of Attorney.
2. Legal Obligation: We are required to keep copies of your passport and or driving licence and proof of address in order to comply with money laundering regulations.
3. Legitimate interest: We may contact you to advise you of services that we offer that are likely to be relevant to you or of interest to you.
4. Consent: where you have asked one of the Lodge Brothers Funeral Arrangers or pre-paid funeral team to pass on your contact details to us so that we can provide you with information about our Legal Services.

### WHERE YOU PROVIDE PERSONAL DATA RELATING TO THIRD PARTIES

When necessary we may ask you to provide us with personal data relating to your intended beneficiaries under your Will, the people you wish to appoint as Attorney or where you are acting as an Executor the contact details or bank details of a beneficiary.

## SHARING YOUR PERSONAL DATA

We sometimes need to share your personal data with 3rd parties in order to complete our contractual obligations to you or to comply with our Legal obligations.

These 3rd parties include:

HMRC

Financial Institutions

The Office of the Public Guardian

The Courts

Land Registry

Pension companies

Certainty, the national Will Register

The Solicitors Regulation Authority

Professional Advisers (Lawyers, accountants, Insurers)

Service Providers ( IT Consultants, IT software and systems providers)

## HOW LONG WE KEEP PERSONAL DATA

We will retain your personal data securely and only in line with how long it is necessary to keep it for a legitimate and lawful reason. We will generally store your data for a period of 6 years after completing the work you have asked us to do in relation to a probate or property matter. If you have made a Will with us we will hold the Will file until your death or until you have notified us that you have made a new Will. We will not destroy any documents such as Wills, Lasting Powers of Attorney, Grants of Probate or Deeds that you have asked us to retain in safe custody.

## YOUR RIGHTS

You have various rights under Data Protection Law, these are:

- The right to access your personal information known as a subject access request.
- The right to have your personal information that we no longer need erased from our records.
- The right to have inaccurate personal information amended.
- The right to ask us to stop using your information in certain situations.
- The right to object to your personal information being used for marketing.
- The right to have your data transferred to another service provider such as a new Solicitor.

## QUERIES AND COMPLAINTS

Any comments or complaints should be directed to The Head of Legal Services. If you believe that we have not complied with this policy or we have not acted in accordance with Data Protection Law you should contact the Head of Legal Services. You can also make a referral to or lodge a complaint with the Information Commissioner's Office (ICO), although the ICO recommends that steps are taken to resolve matters with us before involving them.

**Please contact us on 02035406658 or [legalservices@lodgebrothers.co.uk](mailto:legalservices@lodgebrothers.co.uk)**