



Website Privacy Policy

Policy version: November 2024

This website (**our website**) is provided by Wills & Trusts Legal Limited trading as WT Solicitors (**'we', 'our' or 'us'**). We are the controller of personal data obtained via our website, meaning we are the organisation legally responsible for deciding how and for what purposes it is used.

We take your privacy very seriously. Please read this privacy policy carefully as it contains important information on who we are and how and why we collect, store, use and share any information relating to you (your **personal data**) in connection with your use of our website. It also explains your rights in relation to your personal data and how to contact us or a relevant regulator in the event you have a complaint.

We collect, use and are responsible for certain personal data about you. When we do so we are subject to the UK General Data Protection Regulation (**UK GDPR**).

Given the nature of our website, we do not expect to collect the personal data of anyone under 13 years old. If you are aware that any personal data of anyone under 13 years old has been shared with our website, please let us know so that we can delete that data.

This version of our privacy policy is primarily written for adults, including parents and guardians of child users. **If you are a child (under 18 years old) you are welcome to read this policy if you find it useful, but we recommend you contact us** so we can explain it to you in person.

This privacy policy is divided into the following sections:

- What this policy applies to
- Personal data we collect about you
- How your personal data is collected
- How and why, we use your personal data
- Marketing
- Who we share your personal data with
- How long your personal data will be kept
- Transferring your personal data out of the UK [and EEA]
- Cookies [and other tracking technologies]
- Your rights
- Keeping your personal data secure

- How to complain
- Changes to this privacy policy
- How to contact us
- Do you need extra help?

What this policy applies to

This privacy policy relates to your use of our website only.

Throughout our website we may link to other websites owned and operated by certain trusted third parties for information purposes or to make additional products and services available to you. Those third-party websites may also gather information about you in accordance with their own separate privacy policies. For privacy information relating to those third-party websites, please consult their privacy policies as appropriate.

Personal data we collect about you

The personal data we collect about you depends on the particular activities carried out through our website. We will collect and use the following personal data about you:

- your name, address and contact information, including email address and telephone number and company details
- your gender, if you choose to give this to us
- location data, if you choose to give this to us
- your billing information, transaction and payment card or other payment method information
- bank account and payment details
- details of any information, feedback or other matters you give to us by phone, email, post or via social media
- your account details, such as username and login details
- your activities on, and use of, our website
- your professional online presence, eg LinkedIn profile
- information about the services we provide to you
- your contact history
- information about how you use our website and technology systems
- your responses to surveys, competitions and promotions

You must provide this personal data unless we tell you that you have a choice.

Sometimes you can choose if you want to give us your personal data and let us use it. Where that is the case, we will tell you and give you the choice before you give the personal data to us. We will also

tell you whether declining to share that personal data will have any effect on your use of our website or any services on it.

We collect and use this personal data for the purposes described in the section ‘**How and why we use your personal data**’ below.

How your personal data is collected

We collect personal data from you:

- directly, when you enter or send us information
- indirectly, such as your browsing activity while on our website; we will usually collect information indirectly using the technologies explained in the section on ‘**Cookies**’ below

How and why, we use your personal data

Under data protection law, we can only use your personal data if we have a proper reason, eg:

- where you have given consent
- to comply with our legal and regulatory obligations
- for the performance of a contract with you or to take steps at your request before entering into a contract, or
- for our legitimate interests or those of a third party

A legitimate interest is when we have a business or commercial reason to use your personal data, so long as this is not overridden by your own rights and interests. We will carry out an assessment when relying on legitimate interests, to balance our interests against your own. You can obtain details of this assessment by contacting us (see ‘**How to contact us**’ below).

The table below explains what we use your personal data for and why.

What we use your personal data for	Our reasons
Providing services to you	To perform our contract with you or to take steps at your request before entering into a contract
Conducting checks to identify you and verify your identity or to help prevent and detect fraud against you or us	To comply with our legal and regulatory obligations
Enforcing legal rights or defend or undertake legal proceedings	Depending on the circumstances: —to comply with our legal and regulatory obligations —in other cases, for our legitimate interests, eg to protect our business, interests and rights

What we use your personal data for	Our reasons
<p>Customising our website and its content to your particular preferences based on a record of your selected preferences or on your use of our website</p>	<p>Depending on the circumstances:</p> <p>—your consent as gathered by the separate cookies tool on our website—see 'Cookies' below</p> <p>—where we are not required to obtain your consent and do not do so, for our legitimate interests, ie to be as efficient as we can so we can deliver the best service to you at the best price</p> <p>If you have provided such a consent you may withdraw it at any time.</p>
<p>Retaining and evaluating information on your recent visits to our website and how you move around different sections of our website for analytics purposes to understand how people use our website so that we can make it more intuitive or to check our website is working as intended</p>	<p>Depending on the circumstances:</p> <p>—your consent as gathered by the separate cookies tool on our website—see 'Cookies and other tracking technologies' below</p> <p>—where we are not required to obtain your consent and do not do so, for our legitimate interests, ie to be as efficient as we can so we can deliver the best service to you at the best price</p> <p>If you have provided such a consent you may withdraw it at any time (this will not affect the lawfulness of our use of your personal data in reliance on that consent before it was withdrawn)</p>
<p>Communications with you not related to marketing, including about changes to our terms or policies or changes to the services or other important notices</p>	<p>Depending on the circumstances:</p> <p>—to comply with our legal and regulatory obligations</p> <p>—in other cases, for our legitimate interests, ie to be as efficient as we can so we can deliver the best service to you at the best price</p>
<p>Protecting the security of systems and data used to provide the services</p>	<p>To comply with our legal and regulatory obligations</p> <p>We may also use your personal data to ensure the security of systems and data to a standard that goes beyond our legal obligations, and in those cases our reasons are for our legitimate interests, ie to protect systems and data and to prevent and detect criminal activity that could be</p>

What we use your personal data for	Our reasons
	damaging for you and/or us
Statistical analysis to help us understand our customer base	For our legitimate interests, ie to be as efficient as we can so we can deliver the best service to you at the best price
Updating and enhancing customer records	Depending on the circumstances: —to perform our contract with you or to take steps at your request before entering into a contract —to comply with our legal and regulatory obligations —where neither of the above apply, for our legitimate interests, eg making sure that we can keep in touch with our customers about existing orders and new products
Disclosures and other activities necessary to comply with legal and regulatory obligations that apply to our business, eg to record and demonstrate evidence of your consents where relevant and [insert]	To comply with our legal and regulatory obligations
Marketing our services to existing and former customers	For our legitimate interests, ie to promote our business to existing and former customers See ' Marketing ' below for further information

How and why, we use your personal data—sharing

See '**Who we share your personal data with**' for further information on the steps we will take to protect your personal data where we need to share it with others.

Marketing

We will use your personal data to send you updates (by email, text message, telephone or post) about our services, including exclusive offers, promotions or new services.

We have a legitimate interest in using your personal data for marketing purposes (see above '**How and why we use your personal data**'). This means we do not need your consent to send you marketing information. If we change our marketing approach in the future so that consent is needed, we will ask for this separately and clearly.

You have the right to opt out of receiving marketing communications at any time by:

- contacting us using the contact details on this website
- using the 'unsubscribe' link in emails

We may ask you to confirm or update your marketing preferences if you ask us to provide further services in the future, or if there are changes in the law, regulation, or the structure of our business.

We will always treat your personal data with the utmost respect and never sell it to other organisations for marketing purposes.

For more information on your right to object at any time to your personal data being used for marketing purposes, see '**Your rights**' below.

Who we share your personal data with

We routinely share personal data with:

- other third parties we use to help us run our business, eg marketing agencies, website hosts and website analytics providers
- our banks
- our regulators and professional bodies
- ID verification providers
- legal case management providers

We only allow those organisations to handle your personal data if we are satisfied, they take appropriate measures to protect your personal data.

We or the third parties mentioned above occasionally also share personal data with:

- our and their external auditors, eg in relation to the audit of our or their accounts, in which case the recipient of the information will be bound by confidentiality obligations
- our and their professional advisers (such as lawyers and other advisers), in which case the recipient of the information will be bound by confidentiality obligations
- law enforcement agencies, courts, tribunals and regulatory bodies to comply with our legal and regulatory obligations
- other parties that have or may acquire control or ownership of our business (and our or their professional advisers) in connection with a significant corporate transaction or restructuring, including a merger, acquisition, asset sale, initial public offering or in the event of our insolvency—usually, information will be anonymised but this may not always be possible. The recipient of any of your personal data will be bound by confidentiality obligations

Who we share your personal data with—further information

If you would like more information about who we share our data with and why, please contact us (see '**How to contact us**' below).

How long your personal data will be kept

We will not keep your personal data for longer than we need it for the purpose for which it is used.

Different retention periods apply for different types of personal data.

Transferring your personal data out of the UK

Countries outside the UK have differing data protection laws, some of which may provide lower levels of protection of privacy.

It is sometimes necessary for us to transfer your personal data to countries outside the UK and EEA. In those cases, we will comply with applicable UK and EEA laws designed to ensure the privacy of your personal data.

As we are based in the UK, we will also transfer your personal data from the EEA to the UK.

Under data protection laws, we can only transfer your personal data to a country outside the UK/EEA where:

- in the case of transfers subject to UK data protection law, the UK government has decided the particular country ensures an adequate level of protection of personal data (known as an '**adequacy regulation**') further to Article 45 of the UK GDPR. A list of countries the UK currently has adequacy regulations in relation to is available by going to: <https://gdpr-info.eu/art-45-gdpr/>
- in the case of transfers subject to EEA data protection laws, the European Commission has decided that the particular country ensures an adequate level of protection of personal data (known as an '**adequacy decision**') further to Article 45 of the EU GDPR. A list of countries the European Commission has currently made adequacy decisions in relation to is available by going to https://ec.europa.eu/commission/presscorner/detail/en/ip_24_161
- there are appropriate safeguards in place, together with enforceable rights and effective legal remedies for you, or
- a specific exception applies under relevant data protection law

Where we transfer your personal data outside the UK, we do so on the basis of an adequacy regulation or (where this is not available) some other legal mechanism. In the event we cannot or choose not to continue to rely on either of those mechanisms at any time we will not transfer your personal data outside the UK unless we can do so on the basis of an alternative mechanism or exception provided by UK data protection law and reflected in an update to this policy.

Where we transfer your personal data outside the EEA, we do so on the basis of an adequacy decision or (where this is not available) some other legal mechanism. In the event we cannot or choose not to continue to rely on either of those mechanisms at any time we will not transfer your personal data outside the EEA unless we can do so on the basis of an alternative mechanism or exception provided by applicable data protection law and reflected in an update to this policy.

Any changes to the destinations to which we send personal data or in the transfer mechanisms we rely on to transfer personal data internationally will be notified to you in accordance with the section on '**Changes to this privacy policy**' below.

Cookies

A cookie is a small text file which is placed onto your device (eg computer, smartphone or other electronic device) when you use our website. We use cookies and similar technologies on our website. These help us recognise you and your device and store some information about your preferences or past actions.

Your rights

You generally have the following rights, which you can usually exercise free of charge:

Access to a copy of your personal data	The right to be provided with a copy of your personal data
Correction (also known as rectification)	The right to require us to correct any mistakes in your personal data
Erasure (also known as the right to be forgotten)	The right to require us to delete your personal data—in certain situations
Restriction of use	The right to require us to restrict use of your personal data in certain circumstances, eg if you contest the accuracy of the data
Data portability	The right to receive the personal data you provided to us, in a structured, commonly used and machine-readable format and/or transmit that data to a third party—in certain situations
To object to use	The right to object: —at any time to your personal data being used for direct marketing (including profiling) —in certain other situations to our continued use of your personal data, eg where we use your personal data for our legitimate interests unless there are compelling legitimate grounds for the processing to continue or the processing is required for the establishment, exercise or defence of legal claims
Not to be subject to decisions without human involvement	The right not to be subject to a decision based solely on automated processing (including profiling) that produces legal effects concerning you or similarly significantly affects you We do not make any such decisions based on data collected by our website
The right to withdraw consents	If you have provided us with a consent to use your personal data you have a right to withdraw that consent easily at any time You may withdraw consents by [<i>insert details as relevant depending on consents</i>] Withdrawing a consent will not affect the lawfulness of our use of your personal data in

	reliance on that consent before it was withdrawn
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For further information on each of those rights, including the circumstances in which they do and do not apply, please contact us (see '**How to contact us**' below).

If you would like to exercise any of those rights, please complete a contact form—available on our website, email, call or write to us—see below: '**How to contact us**'. When contacting us please:

- provide enough information to identify yourself and any additional identity information we may reasonably request from you, and
- let us know which right(s) you want to exercise and the information to which your request relates

Keeping your personal data secure

We have appropriate security measures to prevent personal data from being accidentally lost, or used or accessed unlawfully. We limit access to your personal data to those who have a genuine need to access it.

We also have procedures in place to deal with any suspected data security breach. We will notify you and any applicable regulator of a suspected data security breach where we are legally required to do so.

How to complain

Please contact us if you have any queries or concerns about our use of your personal data (see below '**How to contact us**'). We hope we will be able to resolve any issues you may have.

You also have the right to lodge a complaint with:

- the Information Commissioner

The Information Commissioner may be contacted using the details at <https://ico.org.uk/make-a-complaint> or by telephone: 0303 123 1113.

Changes to this privacy policy

We may change this privacy policy from time to time—when we make significant changes, we will take steps to inform you.

How to contact us

Individuals in the UK

You can contact us by post, email or telephone if you have any questions about this privacy policy or the information we hold about you, to exercise a right under data protection law or to make a complaint.

Our contact details are shown below:

Our contact details
91-92 High Street, Thame, Oxon, England, OX9 3EH
info@willsandtrustssolicitors.com
01844 899150

Do you need extra help?

If you would like this policy in another format (for example audio, large print, braille) please contact us (see '**How to contact us**' above).