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## PRIVACY POLICY

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### BACKGROUND:

**The Right Estate Planning Limited** understands that your privacy is important to you and that you care about how your personal data is used and shared online. We respect and value the privacy of everyone who visits these websites (“Our Sites”) and will only collect and use personal data in ways that are described here, and in a manner that is consistent with Our obligations and your rights under the law.

Our Sites:

- [www.therightwill.co.uk](http://www.therightwill.co.uk)
- [www.rightwilladviser.co.uk](http://www.rightwilladviser.co.uk)
- [www.rightwilladviser.com](http://www.rightwilladviser.com)

Please read this Privacy Policy carefully and ensure that you understand it. [Your acceptance of Our Privacy Policy is deemed to occur upon your first use of each of Our Sites] **AND/OR** [You will be required to read and accept this Privacy Policy when signing up for an Account]. If you do not accept and agree with this Privacy Policy, you must stop using Our Sites immediately.

### 1. Definitions and Interpretation

In this Policy the following terms shall have the following meanings:

<b>“Account”</b>	means an account required to access and/or use certain areas and features of Our Site;
<b>“Cookie”</b>	means a small text file placed on your computer or device by Our Site when you visit certain parts of Our Site and/or when you use certain features of Our Site. Details of the Cookies used by Our Site are set out in section 13, below;
<b>“Cookie Law”</b>	means the relevant parts of the Privacy and Electronic Communications (EC Directive) (Amendment) Regulations 2011;
<b>“personal data”</b>	means any and all data that relates to an identifiable person who can be directly or indirectly identified from that data. In this case, it means personal data that you give to Us via Our Site. This definition shall, where applicable, incorporate the definitions provided in the [Data Protection Act 2018] <b>OR</b> [UK General Data Protection Regulation (“UK GDPR”)];
<b>“We/Us/Our”</b>	means The Right Estate Planning Limited and subsidiary companies, a limited company registered in England under company number 15664710, whose registered address is St Johns Court, 50 St Johns Close, Knowle, Solihull, B93 0NN

## 2. **Information About Us**

- 2.1 Our Sites are owned and operated by The Right Estate Planning Limited., a limited company registered in England under company number 15664710 whose registered address is St Johns Court, 50 St Johns Close, Knowle, Solihull, B93 0NN. Our Sites are hosted by Big Wet Fish a trading name of BWF Hosting Ltd and LCN.
- 2.2 Our VAT number is 109147721
- 2.3 Our Data Protection Officer is Pukhraj Singh Babra, and can be contacted by email at admin@therightestateplanning.co.uk, by telephone on 0300 1245 767, or by post at St Johns Court, 50 St Johns Close, Knowle, Solihull, B93 0NN.

## 3. **What Does This Policy Cover?**

This Privacy Policy applies only to your use of Our Sites. Our Sites may contain links to other websites. Please note that We have no control over how your data is collected, stored, or used by other websites and We advise you to check the privacy policies of any such websites before providing any data to them.

## 4. **Your Rights**

- 4.1 As a data subject, you have the following rights under the UK GDPR, which this Policy and Our use of personal data have been designed to uphold:
  - 4.1.1 The right to be informed about Our collection and use of personal data;
  - 4.1.2 The right of access to the personal data We hold about you (see section 12);
  - 4.1.3 The right to rectification if any personal data We hold about you is inaccurate or incomplete (please contact Us using the details in section 14);
  - 4.1.4 The right to be forgotten – i.e. the right to ask Us to delete any personal data We hold about you (We only hold your personal data for a limited time, as explained in section 6 but if you would like Us to delete it sooner, please contact Us using the details in section 14);
  - 4.1.5 The right to restrict (i.e. prevent) the processing of your personal data;
  - 4.1.6 The right to data portability (obtaining a copy of your personal data to re-use with another service or organisation);
  - 4.1.7 The right to object to Us using your personal data for particular purposes; and
  - 4.1.8 Rights with respect to automated decision making and profiling.
- 4.2 If you have any cause for complaint about Our use of your personal data, please contact Us using the details provided in section 14 and We will do Our best to solve the problem for you. If We are unable to help, you also have the right to lodge a complaint with the UK's supervisory authority, the Information Commissioner's Office.
- 4.3 For further information about your rights, please contact the Information Commissioner's Office or your local Citizens Advice Bureau.

## 5. What Data Do We Collect?

Depending upon your use of Our Sites, We may collect some or all of the following personal [and non-personal] data (please also see section 13 on Our use of Cookies and similar technologies)

- 5.1 name;
- 5.2 [business/company name]
- 5.3 [profession;]
- 5.4 [contact information such as email addresses and telephone numbers;]
- 5.5 [demographic information such as post code;]
- 5.6 [IP address;]
- 5.7 [web browser type, version and device type;]
- 5.8 [operating system;]
- 5.9 [a list of URLs starting with a referring site, your activity on Our Sites, and the site you exit to;]
- 5.10 **Annual test results**
- 5.11 Customer data including contact information such as email address and telephone numbers, demographic information such as address and postcode. Business details such as firm name and products interested in / are eligible to sell.

## 6. How Do We Use Your Data?

- 6.1 All personal data is processed and stored securely, for no longer than is necessary in light of the reason(s) for which it was first collected. We will comply with Our obligations and safeguard your rights under the UK GDPR at all times. For more details on security see section 7, below.
- 6.2 Our use of your personal data will always have a lawful basis, either because it is necessary for Our performance of a contract with you, because you have consented to Our use of your personal data (e.g. by subscribing to emails), or because it is in Our legitimate interests. Specifically, We may use your data for the following purposes:
  - 6.2.1 Providing and managing your Account;
  - 6.2.2 Providing and managing your access to Our Site;
  - 6.2.3 Personalising and tailoring your experience on Our Site;
  - 6.2.4 Supplying Our products **OR** services to you (please note that We require your personal data in order to enter into a contract with you);
  - 6.2.5 Personalising and tailoring Our products **OR** services for you;
  - 6.2.6 Replying to emails from you;
  - 6.2.7 Supplying you with emails that you have opted into (you may unsubscribe or opt-out at any time by clicking the unsubscribe link in the footer of all emails or email [admin@therightestateplanning.co.uk](mailto:admin@therightestateplanning.co.uk));
  - 6.2.8 Market research;
  - 6.2.9 Analysing your use of Our Site and gathering feedback to enable Us to continually improve Our Site and your user experience;
- 6.3 With your permission and/or where permitted by law, we may also use your

data for marketing purposes which may include contacting you by email **AND/OR** telephone **AND/OR** text message **AND/OR** post with information, news and offers on our products **AND/OR** services. We will not, however, send you any unsolicited marketing or spam and will take all reasonable steps to ensure that We fully protect your rights and comply with Our obligations under the UK GDPR and The Data Protection, Privacy and Electronic Communications (Amendments etc) (EU Exit) Regulations 2019.

- 6.4 You have the right to withdraw your consent to Us using your personal data at any time, and to request that We delete it.
- 6.5 We do not keep your personal data for any longer than is necessary in light of the reason(s) for which it was first collected. Data will therefore be retained for the following periods (or its retention will be determined on the following bases):
  - 6.5.1 For no longer than it is necessary for us to fulfil our legal and regulatory responsibilities.

## 7. **How and Where Do We Store Your Data?**

- 7.1 We only keep your personal data for as long as We need to in order to use it as described above in section 6, and/or for as long as We have your permission to keep it.
- 7.2 Some or all of your data may be stored outside of the European Economic Area (“the EEA”) (The EEA consists of all EU member states, plus Norway, Iceland, and Liechtenstein). You are deemed to accept and agree to this by using Our Site and submitting information to Us. If We do store data outside the EEA, We will take all reasonable steps to ensure that your data is treated as safely and securely as it would be within the UK and under the UK GDPR including:
  - 7.2.1 Privacy Shield; this framework was designed by the US Department of Commerce, European Commission and Swiss Administration to provide companies on both sides on the Atlantic with a mechanism to comply with Data Protection regulation. For further information [www.privacyshield.gov](http://www.privacyshield.gov)
- 7.3 Data security is very important to Us, and to protect your data We have taken suitable measures to safeguard and secure data collected through Our Site.
- 7.4 Steps We take to secure and protect your data include:
  - 7.4.1 Keeping software up to date;
  - 7.4.2 Restricted access;
  - 7.4.3 Anti-virus software;
  - 7.4.4 Server and email encryption.

## 8. **Do We Share Your Data?**

- 8.1 We may share your data with other companies in Our group for internal marketing purposes. This includes Our Subsidiaries and legal partners. **We** may sometimes contract with third parties to supply products and services to you. These may include payment processing, delivery of goods, search engine facilities, advertising, and marketing. Additionally, your information will be shared with third parties such as lenders, product providers and service

providers who will use your data for the purpose of marketing and transacting business with you. In some cases, the third parties may require access to some or all of your data. Where any of your data is required for such a purpose, we will take all reasonable steps to ensure that your data will be handled safely, securely, and in accordance with your rights, our obligations, and the obligations of the third party under the law.

- 8.2 We may compile statistics about the use of Our Site including data on traffic, usage patterns, user numbers, sales, and other information. All such data will be anonymised and will not include any personally identifying data, or any anonymised data that can be combined with other data and used to identify you. We may from time to time share such data with third parties such as prospective investors, affiliates, partners, and advertisers. Data will only be shared and used within the bounds of the law.
- 8.3 In certain circumstances, we may be legally required to share certain data held by us, which may include your personal data, for example, where we are involved in legal proceedings, where we are complying with legal requirements, a court order, or a governmental authority.

## 9. **What Happens If Our Business Changes Hands?**

- 9.1 We may, from time to time, expand or reduce Our business and this may involve the sale and/or the transfer of control of all or part of Our business. Any personal data that you have provided will, where it is relevant to any part of Our business that is being transferred, be transferred along with that part and the new owner or newly controlling party will, under the terms of this Privacy Policy, be permitted to use that data only for the same purposes for which it was originally collected by Us.
- 9.2 In the event that any of your data is to be transferred in such a manner, you will not be contacted in advance and informed of the changes.

## 10. **How Can You Control Your Data?**

- 10.1 We aim to give you strong controls on Our use of your data for direct marketing purposes (including the ability to opt-out of receiving emails from Us which you may do by unsubscribing using the links provided in Our emails and at the point of providing your details and by managing your Account).

## 11. **Your Right to Withhold Information**

- 11.1 You may access certain areas of Our Site without providing any data at all. However, to use all features and functions available on Our Site you may be required to submit or allow for the collection of certain data.
- 11.2 You may restrict Our use of Cookies. For more information, see section 13.

## 12. **How Can You Access Your Data?**

You have the right to ask for a copy of any of your personal data held by Us (where such data is held). Under the UK GDPR, no fee is payable and we will provide any and all information in response to your request free of charge. Please contact us for more details at [admin@therightestateplanning.co.uk](mailto:admin@therightestateplanning.co.uk), or using the contact details below in section 14.

### 13. Our Use of Cookies

- 13.1 Our Site may place and access certain first party Cookies on your computer or device. First party Cookies are those placed directly by Us and are used only by Us. We use Cookies to facilitate and improve your experience of Our Site and to provide and improve Our products **AND/OR** services. We have carefully chosen these Cookies and have taken steps to ensure that your privacy and personal data is protected and respected at all times.
- 13.2 All Cookies used by and on Our Site are used in accordance with current Cookie Law.
- 13.3 Before Cookies are placed on your computer or device, you will be shown a prompt e.g. cookie pop up requesting your consent to set those Cookies. By giving your consent to the placing of Cookies you are enabling Us to provide the best possible experience and service to you. You may, if you wish, deny consent to the placing of Cookies; however certain features of Our Site may not function fully or as intended.
- 13.4 Certain features of Our Site depend on Cookies to function. Cookie Law deems these Cookies to be “strictly necessary”. These Cookies are shown below in section 13.5. Your consent will not be sought to place these Cookies, but it is still important that you are aware of them. You may still block these Cookies by changing your internet browser’s settings as detailed below in section 13.9, but please be aware that Our Site may not work properly if you do so. We have taken great care to ensure that your privacy is not at risk by allowing them.
- 13.5 The following first party Cookies may be placed on your computer or device:

Name of Cookie	Purpose	Strictly Necessary
Session cookie	To make sure you have signed in correctly and have access to the information you need as an adviser.	Yes
Banner cookie	Our websites contains small banners from our service providers. These banners are controlled by us and not a third party. We only track clicks and Impressions for this and is completely anonymous.	Yes

- 13.6 Our Site uses analytics services provided by Google Analytics. Website analytics refers to a set of tools used to collect and analyse anonymous usage information, enabling Us to better understand how Our Site is used. This, in turn, enables Us to improve Our Site and the products **AND/OR** services offered through it. You do not have to allow Us to use these Cookies, however whilst Our use of them does not pose any risk to your privacy or your safe use of Our Site, it does enable Us to continually improve Our Site, making it a better and more useful experience for you.
- 13.7 The analytics service(s) used by Our Site use(s) Cookies to gather the required information.
- 13.8 The analytics service(s) used by Our Site use(s) the following Cookies:

Name of Cookie	First / Third Party	Provider	Purpose
Tracking cookie	third party	Google	<p>All of this information is anonymous and is used to compile general visitor statistics such as what type of device is used, how long spent on sites, what pages are looked at, how people reached our sites (e.g. from a search engine) and whether they have been here before.</p> <p>All of this data is completely anonymous and helps us to build a better website and experience for our visitors.</p>

13.9 In addition to the controls that we provide, you can choose to enable or disable Cookies in your internet browser. Most internet browsers also enable you to choose whether you wish to disable all cookies or only third party cookies. By default, most internet browsers accept Cookies but this can be changed. For further details, please consult the help menu in your internet browser or the documentation that came with your device.

13.10 You can choose to delete Cookies on your computer or device at any time, however you may lose any information that enables you to access Our Site more quickly and efficiently including, but not limited to, login and personalisation settings.

It is recommended that you keep your internet browser and operating system up-to-date and that you consult the help and guidance provided by the developer of your internet browser and manufacturer of your computer or device if you are unsure about adjusting your privacy settings.

#### 14. Know your Cookies

All Cookies used by and on Our Site are used in accordance with current Cookie Law. We may use some or all of the following types of Cookie:

**Strictly Necessary Cookies:** A cookie falls into this category if it is essential to the operation of your website. Strictly necessary cookies may, for example, be required for functions such as logging in, storing items in a shopping basket, or enabling payment transactions.

**Analytics Cookies:** Understanding how users use your website can be extremely valuable. Analytics cookies provide insights into many factors such as how users are navigating around the site and what features they are using. Analytics cookies may often be set by third parties, but not always. To add to complications, however, even if analytics cookies are set by you, if the data collected by them is processed by a third party, they will be treated differently from a data protection perspective.

**Functionality Cookies:** Many websites offer some level of personalisation and functionality cookies play a key role here. For auditing purposes, however, it is important not to confuse these with the strictly necessary variety. If the site can be used properly without the cookie, it isn't strictly necessary.

**Targeting Cookies:** It is important to know when and how often someone visits your website, and which parts of it they have used (including which pages they have visited and which links they have followed). As with analytics cookies, targeting cookies allow you to better understand your users, enabling you to make your site and, more importantly, the advertising on it more relevant to those users' interests. Targeting cookies may often be set by third parties.

**First-Party Cookies:** As the name suggests, these cookies are placed directly by your website (as opposed to those placed by third-party services, for which see below). Most, if not all, of your strictly necessary and functionality cookies will likely be first-party cookies.

**Third-Party Cookies:** These cookies are placed by third parties providing services such as advertising and analytics. Analytics and targeting cookies are common types of third-party cookie as such work is often not undertaken in-house.

**Persistent Cookies:** Any of the cookies listed above may be a persistent cookie. Persistent cookies are those which remain active on a user's computer or device for a predetermined period of time and are activated when that user visits your website.

Any of the above types of Cookie may be a session Cookie. Session Cookies are temporary and only remain on your computer or device from the point at which you visit Our Site until you close your browser. Session Cookies are deleted when you close your browser.

Cookies on Our Site are not permanent and will expire after 30 days

For more specific details of the Cookies that We use, please refer to the table in section 13

## 15. Contacting Us

If you have any questions about Our Site or this Privacy Policy, please contact Us by email at [admin@therightestateplanning.co.uk](mailto:admin@therightestateplanning.co.uk), by telephone on 0300 1245 767, or by post at St Johns Court, 50 St Johns Close, Knowle, West Midlands, B93 0NN. Please ensure that your query is clear, particularly if it is a request for information about the data We hold about you (as under section 12, above).

## 16. Changes to Our Privacy Policy

We may change this Privacy Policy from time to time (for example, if the law changes). Any changes will be immediately posted on Our Site and you will be deemed to have accepted the terms of the Privacy Policy on your first use of Our Site following the alterations. We recommend that you check this page regularly to keep up-to-date.

This Policy has been approved and authorised by:

<b>Name:</b>	Pukhraj Singh Babra
<b>Position:</b>	Director & DPO
<b>Date:</b>	01/07/2024
<b>Due for Review by:</b>	01/07/2025