

## Privacy Notice



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## Who we are

Brachers LLP is a limited liability partnership incorporated in England and Wales and is a 'controller' under the General Data Protection Regulation and the Data Protection Act 2018.

## Whose data we hold

We may hold data about the following people:

- Clients
- Trustees
- Personal representatives / Executors
- Beneficiaries
- Suppliers and service providers
- Complainants
- Enquirers
- Advisers, consultants and other professional experts
- Employees

## Data that will be collected

We will only collect information from you which is relevant to the matter we are dealing with. In particular we may collect the following information from you which is defined as 'personal data':

- Personal details
- Family details
- Lifestyle and social circumstances
- Financial details
- Business activities of the person whose details we are processing
- Information set out in a trust, deed, or Will, including letter of wishes addressed to us by the settlor or testator

## Special categories

We may also collect information that is referred to as being 'special category'. This could include:

- Physical and mental health details
- Racial or ethnic origin
- Religious beliefs or other beliefs of a similar nature
- Criminal convictions
- Sexual orientation

## Basis for processing

It is necessary for the performance of our contract with you.

It is necessary for us to comply with a legal obligation.

It is in our legitimate interest to do so.

You have given us your consent (this can be withdrawn at any time by advising our data protection lead).

For the purposes of the supervision and management of our employees.

### How we will use your data

We may use your information for the following purposes:

- The provision of legal services including advising and acting on behalf of clients.
- To maintain our accounts and records.
- Promotion of our goods and services.
- To support and manage our employees and this may include providing anonymised data to external assessment and validation bodies as part of employees' formal training requirements or our regulatory obligations.
- To comply with regulatory obligations including passing required information to the Solicitor's Regulatory Authority or the Legal Ombudsman.

### Who we will share your information with

- Barristers
- Medical experts
- Healthcare professionals, social and welfare organisations
- Courts and tribunals
- Business associates
- Solicitors, agents or accountants acting for a trust or estate
- Ombudsman and regulatory authorities
- Financial organisations
- Credit reference agencies
- Private investigators
- Central government including HMRC and the Probate Registry
- Anonymised information may be shared with external assessment and validation bodies as part of employees' formal training requirements.
- Limited data may be accessed by companies who provide IT and other support functions, for the purposes of facilitating our work for client and where appropriate confidentiality and data protection arrangements are in place.

Where you authorise us, we may also disclose your information to your family, associates or representatives and we may also disclose your information to debt collection agencies if you do not pay our bills.

In respect of Marketing Services, we will not process your data without your consent unless it is on the basis of there being a legitimate interest.

### Transfers to third countries

We may from time to time transfer your personal data to a country outside of the EEA. Normally this will be necessary for the performance of your contract with us or for the exercise or defence of legal claims on your behalf. Sometimes we may transfer for other reasons and we will ensure that appropriate safeguards are in place at all times.

### Security arrangements

We shall ensure that all the information that you provide to us is kept secure using appropriate technical and organisational measures. We are ISO 9001 accredited. In the event of a personal data breach we have in place procedures to ensure the effects of such a breach are minimised and shall liaise with the ICO and with you as appropriate.

More information is available from the data protection lead.

### How long we will keep your information for

We will normally keep your information throughout the period of time we do work for you and afterwards for a minimum period of six years, as we are required to do by law and also by the regulations that apply to us. In some cases (for example where we have prepared a will for you) we may retain your information for a longer period and we will advise you of this at the time.

More information is set out in our data retention policy which is available on request from the data protection lead.

### Your Data Protection rights

You have the following rights under the GDPR:

- Right to be informed
- Right of access
- Right to request rectification
- Right to request erasure
- Right to restriction of processing
- Right to data portability
- Right to object

### Right of access

You have a right to see the information we hold about you. To access this you need to provide a request in writing to our data protection lead, together with proof of identity.

We will usually process your request free of charge and within 30 days. However, we reserve the right to charge a reasonable administration fee and to extend the period of time by a further two months, if the request is manifestly unfounded or vexatious and / or is very complex.

Full details are available in our data subject access policy which is available on request from the data protection lead.

### Right of erasure

You have a right to ask us to erase your personal data in certain cases (details may be found in Article 17 of the GDPR). We will deal with your request free of charge and within 30 days, but reserve the right to refuse to erase information that we are required to retain by law or regulation, or that is required to exercise or defend legal claims.

To exercise your right to erasure, please contact our data protection lead.

### Who you can complain to

If you are unhappy about how we are using your information or how we have responded to your request then initially you should contact the data protection lead; Catherine Daw, Data Protection Lead, Brachers LLP, Somerfield House, 59 London Road, Maidstone, Kent, ME16 8JH

If your complaint remains unresolved, then you can contact the Information Commissioner's Office. Details are available at [www.ico.gov.uk](http://www.ico.gov.uk).

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59 London Road  
Maidstone, Kent  
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**Call us on** 01622 690691  
**Visit us at** [brachers.co.uk](http://brachers.co.uk)



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Brachers LLP