

## Privacy Policy

Legacy Legal is an Estate Planning company. Through our activities we help customers protect their assets and estate.

For the purpose of the applicable data protection legislation (meaning, prior to 25 May 2018 the Data Protection Act 1998 and from 25 May 2018 the General Data Protection Regulation and any legislation which implements it) (the "Data Protection Legislation"), the data controller is Legacy Legal Limited a company registered in England and Wales (0877459) also other Companies and entities associated with us. Our Registered Office is at 5 Braemore Court, Cockfosters Road, Barnet, England EN4 0AE.. References in this Privacy Notice to "we", "our" or "us" are references to Legacy Legal Limited. References to "you" and "your" means each natural or legal person who interacts with us, uses our website or the products and services we provide.

Please read this Privacy Notice carefully as it explains our practices regarding your Personal Data and how we will treat it. This Privacy Notice (together with our Cookie Statement) sets out how we collect, process and use your 'Personal Data'. It is relevant to anyone who interacts with us, including users of our website [www.legacylegal.co.uk](http://www.legacylegal.co.uk), [www.llconsultants.co.uk](http://www.llconsultants.co.uk) and other services we provide from time to time.

### OUR PRIVACY COMMITMENTS

We respect your privacy and protecting your information is important to us. We will be clear and open with you on what Personal Data we collect and how we process it and we will only use information that we collect about you lawfully in accordance with the Data Protection Legislation.

We take data security seriously, and so for as long as we maintain records of your Personal Data, we will endeavour to keep it up to date and protect it with appropriate safety and security measures and policies to prevent it from being accidentally lost and from unauthorised use and access.

We regularly review our security systems to ensure that your Personal Data remains safe and secure.

### *Data we collect and process*

We collect and process the following Personal data from or about you as a user of our Sites or services or as a member, client, speaker, delegate, event attendee or subscriber to our newsletters:

- Personal Data collected directly from you through the membership process which may include contact details such as name, job title, postal address, telephone numbers email addresses and financial transactional data such as credit or debit card numbers used in relation to our services. We will NOT store any credit or direct card numbers and will only use a secure online payment platform for processing.
- Personal Data collected directly from you as an customer which may include contact details such as name, job title, postal address, telephone numbers email addresses and financial transactional data such as credit or debit card numbers used in relation to our services. We will NOT store any credit or direct card numbers and will only use a secure online payment platform for processing.
- Personal Data collected directly from you as a subscriber to our newsletter which may include contact details such as name, job title, postal address, telephone numbers and email address.
- Personal Data received directly from you by email, telephone call or by business card at networking events, conferences or from third parties acting on your behalf or from supplier invoices.

- Personal Data collected automatically from the use by you of any of the Sites. The data transmitted from your browser includes your IP address, the date and time of the visit the pages accessed, the access status/HTTP status code, your browser, your operating system and interface, as well as the language and version of the browser software.
- We receive the following Personal Data about you if you follow one of our social media accounts which may include your account name, gender, general interests, location, age.
- Personal Data received indirectly through our suppliers which enables us to create and store a record of your activity/purchase history.
- Personal Data we collect about you from publicly available sources. This may include information available from social media (depending on your settings and the applicable privacy policies), including social media engagement metrics such as numbers of connections, followers and clicks, and information from resources such as Companies House.
- Personal Data we receive from other sources. We may receive further information about you if you use any of the services we provide. We work closely with third parties (including, for example, business partners, service providers, identity verification providers) and may receive information about you from them. We may combine information we receive from these other sources with information you give to us and information we collect about you.

**Purposes and legal basis for using your data** Where you have requested that we provide any of our services to you, or you otherwise make use of those services, we will process your Personal Data in order to perform our contract with you and provide those services to you.

- We also use the Personal Data we hold about you to pursue our legitimate interests in providing and marketing our services to you, improving our website, services and interactions with you and other users of our services in the following ways: For the administration of your membership, use of our Sites and services, purchases and attendance at our events and to communicate with you regarding the same by telephone, mail, email, text (SMS) message, instant messaging or other electronic means.
- To contact you with surveys and feedback requests (for example relating to a product purchased).
- To analyse the purchase history of our customers and the way our customers use the Sites.
- To process orders and to issue your invoices and collect payments and to make payments to suppliers where applicable. (In instances where payment is made by direct / credit cards your details will not be stored by us, and will be processed via a secure online payment platform (for example Stripe)).
- To verify your identity as part of our identity authentication process and to prevent, detect and prosecute fraud and crime and comply with legal or regulatory, requirements;
- To provide you with information about the services that you request from us;
- To provide you with information about other services we offer that are similar to those that you have already purchased or enquired about;
- To provide you with information about products or services we feel may interest you or be best for you;
- notify you about changes to our services;
- ensure that content from our website is presented in the most effective manner for you and your device;
- aggregate it on an anonymous basis with other data for data analytical and reporting purposes;
- to administer our Sites and for internal operations, including troubleshooting, data analysis, testing, research, statistical and survey purposes;
- to build up a picture of your interests so that you don't miss information relevant to you when you visit our Sites;
- to improve the service we offer you and to try and ensure that you get the best from our Sites in the short term, for example by providing you with relevant search results;

- to improve the service we offer you and to try and ensure that you get the best from our Sites over the longer term, for example by understanding how you and other users interact with our Sites;
- to allow you to participate in interactive features of our service, when you choose to do so;
- as part of our efforts to keep our Sites safe and secure;
- to measure or understand the effectiveness of advertising we serve to you and others, and to deliver relevant advertising and marketing messages to you, including through newsletters and email correspondence;
- to make suggestions and recommendations (both through the website and other channels, such as email) to you and others about products or services that we think may interest you or them based on your and their usage patterns both on our Sites and in relation to our communications with you and them on other channels (such as email);
- for training and quality purposes;
- to check any instructions you give to us and for the purposes of investigating any complaint you may make, or as evidence in any dispute or anticipated disputes between you and us.

In some cases we may also use the Personal Data we hold about you to comply with our legal obligations, or enter into or perform a contract with you.

We may also send you direct marketing communications (for example, by email). We will ensure that we have your consent for this if the law requires us to do so. You can withdraw this consent and/or unsubscribe from receiving these communications at any time as described in the Direct Marketing section below.

### **Cookies**

In accordance with industry standards, we may use cookies (small text files which are transferred to your browser by the Sites to identify data traffic patterns, personalise contents and support security). They do not provide any information which might disclose the identity of a specific person but they may potentially identify your operating system, your browser and your internet settings. You may change the storing of cookies in your browser settings at any time by selecting the function “accept no cookies”. However, disabling essential cookies may result in you no longer be able to use the entire functionality of our/other Sites.

### **Google Analytics**

Google Analytics, a web analytics service provided by Google, Inc. (“Google”) also places cookies on your computer, to enable Google to provide us with activity reports relating to the Sites. Google uses this data only to provide us with information on how users use the Sites and does not associate your IP address with any other data held by Google. The information generated by Google cookies about your use of the platform (including your IP address) will be transmitted to and stored by Google on servers in the United States. You may refuse these cookies by selecting the appropriate settings on your browser or by downloading and installing the browser plug-in available under <https://tools.google.com/dlpage/gaoptout?hl=en-GB>.

### **Data Sharing**

We do not sell your Personal Data and will only share your Personal Data with third parties as stated in this Privacy Notice. We review all our relationships with third parties carefully so that we can be sure as possible that their practices match our own commitments to you relating to privacy and security. We also comply with the Data Protection Legislation in our dealings with these third parties to ensure that your information is appropriately protected.

Disclosure of your Personal Data to others may be necessary to ensure the smooth provision to you of the services and information you request. Your Personal Data may be disclosed to the other entities as described below.

We may share your Personal Data with selected third parties including:

- Business partners, suppliers and sub-contractors for the performance of any contract we enter into with you;
- Identity verification providers, to comply with legal or regulatory requirements;
- Analytics and search engine providers that assist us in the improvement and optimisation of our website;
- IT and software providers who supply us with our IT infrastructure for the provision of our services and administering our business (including our internal and external communications) and who also help us manage our customer and contact databases, customer relationships and marketing.

We may disclose your personal information to third parties if:

- We sell or buy any business or assets, in which case we may disclose your personal data to the prospective seller or buyer of such business or assets;
- Legacy Legal Limited or substantially all of its assets are acquired by a third party, in which case personal data held by it about its customers will be one of the transferred assets; and
- We are under a duty to disclose or share your Personal Data in order to comply with any legal obligation, or in order to enforce or apply any contract with you and other agreements; or to protect the rights, property, or safety of Legacy Legal Limited, our customers, or others.

### *Social Media and Third Party Websites*

Our Sites may also include social media features (e.g., share or like buttons). Such features are provided by third-party social media platforms such as LinkedIn, Twitter, or Facebook. Where data is collected this way, its processing is governed by the privacy policy of the respective social media platforms.

Our Sites may, from time to time, contain links to and from the websites of our partner networks, advertisers and affiliates. If you follow a link to any of these websites, please note that these websites have their own privacy policies and that we do not accept any responsibility or liability for these policies. Please check these policies before you submit any personal data to these websites.

### *Direct Marketing*

We may send direct marketing communications to you, including by email, telephone or SMS or mail. We will ensure that we have your consent for this if the law requires us to do so.

Whenever you receive direct marketing from us you will be told how you can unsubscribe so that you no longer receive it. When we communicate with you via email you will also be given the opportunity to set or amend any preferences that you have indicated to us. You can do this at any time by following the link in the footer of the last email you received from us (“Update your subscription preferences” or “Unsubscribe”) or by **sending your request** [enquiries@legacylegal.co.uk](mailto:enquiries@legacylegal.co.uk) with detailed instructions for our team.

You are also able at any time to withdraw any consent to receive marketing communications that you have given to us. You can do this by contacting us using the details the same details as specified above.

Please provide us with your full name, address and other contact details to enable us to find your records. Sometimes we may also need to contact you further to ask you for additional information so that we can comply with your request.

### *Where we store your Personal Data*

Where we store your Personal Data ourselves it is stored on our secure servers in the UK. However, where we share your information with third parties this may involve transferring it to a country outside the European Economic Area (EEA). This may include countries that do not have data protection laws which are as strong as those in the UK. Where we do this we will take the steps required under the Data Protection Legislation to ensure that your information is appropriately protected. If you would like any further information about this then please contact us using the details in the Contacting Us section below.

Unfortunately, the transmission of information via the internet is not completely secure. Although we will do our best to protect your Personal Data, we cannot guarantee the security of your data transmitted to our Sites; any transmission is at your own risk. Once we have received your information, we will use strict procedures and security features to try to prevent unauthorised access, loss or damage.

### ***Duration of Storage***

How long we keep your Personal Data will depend on the purpose for which we use it and so may vary. We will only retain your information for as long as is necessary for the purposes set out in this Privacy Notice and as is necessary to comply with our legal obligations. We do not keep more Personal Data than we need for the particular purpose.

We will maintain records of your Personal Data for as long as you remain:

- a registered and active subscriber to our mailing list;
- a registered user/member of any of our Sites or services;
- for as long as is necessary to provide our services to you.

Where we have provided you with a service we may also keep an archived record of your Personal Data for a period of up to 6 years after termination (unless a longer period is prescribed by law) for the purposes of responding to legal disputes and legal enquiries or investigations only, but will not use this data for any other purpose.

If you ask us to stop sending direct marketing communications to you (see the Direct Marketing section, above), we will keep the minimum amount of information necessary (such as your name and email address) to ensure that we are able to adhere to your request.

### ***Your Rights in Relation to your Personal Data***

Under the Data Protection Legislation, you have certain rights in respect of the Personal Data we hold about you. This includes: right to update and correct that Personal Data, the right to request from us a copy of your Personal Data, the right to request restriction of the processing of that Personal Data, the right to request that we delete that Personal Data and the right to object to our continued processing of your Personal Data. You may also have the right to data portability. These rights are limited in some situations. For example, if we have a legal requirement or a compelling legitimate ground we may continue to process your data even where you request its deletion.

We may ask for further information from you or require you to provide us with appropriate identification before we comply with any request. .

If you have a complaint about the way in which we use your personal information we would encourage you to contact us in the first instance ([enquiries@legacylegal.co.uk](mailto:enquiries@legacylegal.co.uk)) but you also have the right to complain directly to the Information Commissioner ([www.ico.gov.uk](http://www.ico.gov.uk)).

If you would like to exercise any of these rights then you can contact us using the contact information provided in the Contacting Us section, below.

### *Changes to our Privacy Notice*

We will update this Privacy Notice from time to time to reflect changes in our business or the law. All such changes will be posted to the Sites and if we consider it to be appropriate we will notify you of any material changes by e-mail.

### *Contacting us*

If you would like to know what information we hold about you or if you have any other queries or complaints in relation to this Privacy Notice, or our Sites, our contact details are as follows:

Written correspondence:

5 Braemore Court,  
Cockfosters Road,  
Barnet,  
England  
EN4 0AE

Email: [enquiries@legacylegal.co.uk](mailto:enquiries@legacylegal.co.uk)

Telephone: 01483 662 966