

This privacy notice is intended for individuals who are not clients of Archers Law LLP but for whom we nevertheless hold personal information in connection with trusts, estates, powers of attorney or Court of Protection matters. It must be read in conjunction with Archers Law LLP new cookies policy/privacy notice (<https://www.archerslaw.co.uk/policy/>) (“the general privacy notice”) together with any other documents referred to in it and any other privacy notice or fair processing notice which we may provide on specific occasions. Together these set out the basis on which any personal data held by Archers Law LLP about you will be processed.

## **THE DATA WE COLLECT ABOUT YOU**

In addition to those categories set out in the general privacy notice, we may collect, store and use the following categories of personal information about you:

- Information set out in documentation or verbally provided to us by our client(s) including but not limited to clients who are: settlors of a trust, testators, executors, trustees, attorneys or donors of a power of attorney, or Court of Protection deputies
- Information set out in documentation or verbally provided to us by a third party during the course of the matter
- Information set out in documentation or verbally provided to us by you during the course of the matter
- Information set out in any will or trust deed
- Information set out in any letter of wishes by a settlor, testator or donor of a power of attorney

## **HOW IS YOUR PERSONAL DATA COLLECTED?**

In addition to the sources listed above, and the sources set out in the general privacy notice, we may process personal information about you from the following:

- A bankruptcy search provider
- A credit reference agency

## **HOW WE USE YOUR PERSONAL INFORMATION**

In addition to those circumstances set out in the general privacy notice, we may use your personal information in the following circumstances:

- To communicate with you
- To perform the contract we have entered into with our client(s) in relation to the provision of services
- To assess any beneficial entitlement
- To carry out bankruptcy searches before making any distributions to you
- To comply with legal or regulatory requirements

We may also collect, store and use sensitive personal information to help compliance with the wishes of our client(s) or a settlor of a trust or a deceased testator, to enable the identification and protection of your rights as a beneficiary or to assist a 'best interests' decision by an attorney or Court of Protection deputy.

## **DATA SHARING**

In addition to those third parties set out in the general privacy notice, we may share your personal information with the following third parties for the purposes of administering the trust, estate, attorneyship or deputyship, or making the Court of Protection application, in which we are acting:

- Office of the Public Guardian
- Court of Protection
- Third party professional advisors and other service providers who are instructed in the matter

## **DATA RETENTION**

### **How long will you use my information for?**

We will retain your personal information for as long as necessary to fulfil our legal obligations, and those of our client(s), in relation to the purposes we collected it for. We retain your personal information for that period so that we can show, in the event of a legal claim, that the legal obligations of ourselves and our client(s) have been fulfilled correctly. After this period, we will securely destroy your personal information in accordance with our data retention policy.

## **LEGAL NOTICE UPDATE**

We reserve the right to make any changes and corrections to this notice. Please refer to this page from time to time to review this and new additional information.