



# FAMILY WISE LTD

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## **Client privacy notice for clients of Family Wise Ltd**

This privacy notice outlines how Family Wise Ltd collects and processes personal data relating to its clients and potential beneficiaries of estates. Family Wise Ltd is committed to being transparent about how it collects and uses that data and to meeting its data protection obligations.

### **What information does Family Wise Ltd collect?**

Family Wise collects and processes information about its clients. This mainly includes:

- Client name, address and contact details, including email address and telephone number; and
- information to verify identity. We are legally required to hold certified copies of two pieces of identification to confirm the identity of our clients. The documents we use are listed here: <https://www.gov.uk/guidance/make-a-claim-to-a-deceased-persons-estate#identity-documents>

Other documentation such as a birth, marriage and death certificates are also required to prove entitlement, and these may be provided by our clients.

### **How is your information stored by Family Wise Limited?**

Data will be stored in a range of different places within Family Wise Ltd, including in paper-based filing systems and Family Wise Ltd's email and content management systems.

### **Why does Family Wise Ltd process personal data?**

Family Wise Ltd has a legitimate interest in processing the personal data of potential beneficiaries. Processing the data outlined above enables the company to contact potential beneficiaries to determine whether they have an entitlement to any estate and then process data about its clients in order to provide the required evidence to prove their claim to intestate estates.

### **Who has access to data?**

Your information will be shared internally within Family Wise Ltd and with third-parties registered with the Information Commissioner's Office (ICO), solicitors, financial institutions and referrers in order to further your legal claim to the unclaimed estate.

Family Wise will not share your data with anyone else without your permission. It will also not transfer your data to countries outside the European Economic Area.



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As seen on



ico.

Information Commissioner's Office

ICO Registration: ZA069854

## **How does Family Wise Ltd protect data?**

Family Wise Ltd takes the security of your data seriously. Family Wise Ltd has internal policies and controls in place to try to ensure that your data is not lost, accidentally destroyed, misused or disclosed, and is not accessed except by its employees in the performance of their duties. Personal data in paper form is kept in locked cupboards in an office which is locked and alarmed when no-one is present in the offices. Personal data which is stored electronically is protected by passwords.

## **For how long does Family Wise Ltd keep data?**

Family Wise Ltd will hold both client and beneficiary personal data in perpetuity because the processes undertaken on behalf of clients are legal and enquiries can be made of estate administrators at any point in the future.

## **Your rights**

As a data subject, you have a number of rights. You can:

- access and obtain a copy of your data on request;
- require Family Wise Ltd to amend incorrect or incomplete data;
- require Family Wise Ltd to delete or stop processing your data (e.g. where the data is no longer necessary for the purposes of processing; and
- object to the processing of your data where Family Wise Ltd is relying on its legitimate interests as the legal ground for processing.

If you would like to exercise any of these rights, please contact Kirsty Gray, Managing Director at [info@family-wise.co.uk](mailto:info@family-wise.co.uk).

If you believe that Family Wise Ltd has not complied with your data protection rights, you can complain to Kirsty Gray, Managing Director. If we are unable to resolve your complaint to your satisfaction, you can also contact the Information Commissioner's Office.

This privacy notice was updated in May 2018.



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