

Max Gold Wills & Trusts – Privacy Notice

Introduction

This document is the Privacy Notice of Max Gold Wills Limited. It details how we store, process, and share your personal information. It is our aim to be fully compliant with the EU General Data Protection Regulation (“GDPR”).

We store your data securely, process your data with utmost confidentiality, and only share it with trusted third parties who have confirmed to us that they are fully GDPR compliant.

If you believe that any of the personal data we hold about you is inaccurate, you should contact us immediately and we will rectify it as soon as possible.

Changes to this document may be made from time to time. It is published in its entirety on our website at <https://maxgoldwills.uk>

Our contact details are as follows:

Max Gold Wills Limited
CWG House
Gallamore Lane
Market Rasen
Lincolnshire
LN8 3HA
Tel: 01673 841323
Email: admin@maxgoldwills.uk

If you have any questions about this document or if you wish to make a Subject Access Request or exercise any of your other rights under GDPR, please email our Data Protection Officer directly at dpo@maxgoldwills.uk

Why We Store Your Personal Data

Pursuant to the GDPR, we process your personal data under the lawful basis of **contractual obligation**.

It is necessary that we store, process, and share your personal data so that we may fulfil our contractual obligations to you as a customer—that is, to provide our services.

The Data We Collect

As a customer (or potential customer) you will need to provide us with your personal data, some of which is considered very private.

In order to provide our services to you, the following categories of personal data may be required:

- **Personal details:** your name, address, date of birth, gender, telephone number(s), email address, and relationship status.

- **Family & friend details:** personal details (name, address, date of birth, relationship to you) of people who are not directly our clients but need to be named on documents we produce, for example your siblings, children, and trusted friends.
- **Financial details:** exact or estimated values of your current account(s), savings, shares, bonds, life assurance policies, pensions, and other financial assets.
- **Property details:** addresses and exact or estimated values of your main home and any other properties owned, even if they are overseas.
- **Other asset details:** basic details of other assets that need to be considered when undertaking estate planning for you, for example cars, jewellery, and other specific gifts.

We understand that some people may be reticent to disclose some of the above information. Rest assured that all personal information we collect is kept secure and confidential, and we only collect what is necessary to provide our services.

Refusing To Provide Your Data

You are well within your rights to refuse to provide us with some or all of your personal data as detailed above. However, the quality and applicability of our services is heavily dependent upon the data which you choose to provide.

If you wish to refuse to provide some of your personal data, you must make this clear to us at the time of discussing your requirements, before we formally take your order.

Sharing Your Personal Data

In the course of providing our services to you we may need to share your data with trusted third parties. We only share your data with third parties who have confirmed to us that they are fully GDPR compliant.

However, we may share your data with law enforcement agencies or any related bodies upon request as necessary to comply with the Proceeds of Crime Act 2002 or for any other reason in co-operation with law enforcement.

Data Shared with Zoho Corporation Pvt. Ltd.

We utilise Customer Relationship Management software produced by Zoho Corporation (“Zoho”) in order to track the progress of our clients’ orders. This software is accessed and used online; therefore we transmit your personal data to them. They are based in the United States of America.

Your personal data is only ever transmitted over a secure, encrypted connection to Zoho’s servers. Once your data is there, it is stored on encrypted disks and is only accessible to us.

In the interests of transparency, Zoho have released a public GDPR statement which you can read here: <https://www.zoho.com/gdpr.html>

Data Shared with Countrywide Tax & Trust Corporation Ltd

As we work in association with Countrywide Tax & Trust Corporation (“Countrywide”) we will need to share your personal data with them, as they may need to produce some documentation on our behalf for the fulfilment of an order you have placed with us.

When we share your personal data with Countrywide, we may do so

- via their bespoke software package, which transmits your data over a secure connection directly to their servers, or;
- via email, as an encrypted attachment.

(Note: We do not ever include your personal data in the subjects or body texts of any emails, as neither are encrypted, nor is it possible to encrypt them without considerable effort on the parts of both the sender and recipient.)

Data Shared with HM Land Registry

As part of providing our services to you, it may be necessary for us to undertake a search with HM Land Registry (“HMLR”) against your property or properties located within England and Wales.

When we do this, we only share with HMLR the address details you have provided to us. We share this data by inputting your address details into their secure “e-services portal” website where it is encrypted in transit.

Data Shared with the Office of the Public Guardian

As part of providing our services to you, it may be necessary for us to share your personal data with the Office of the Public Guardian (“OPG”).

When we do this, we only share your personal data through application forms which are produced by the OPG. In the unlikely event that we need to correspond with the OPG in relation to your order, we only do so by post.

How We Store and Protect Your Personal Data

Any of your personal data which is stored on our computers is encrypted and accessible only by authorised staff members.

When sharing your personal data with a third party, we always ensure that the connection to the third party is encrypted and we verify that any personal data they store is encrypted and protected from unauthorised access.

As part of our services we offer our clients the option to store their completed physical documentation with us. As this documentation is of a private and potentially sensitive nature, we have implemented various physical and electronic security systems to ensure its protection, and it is only accessible to a small number of nominated staff members.

Our Website

Our company website is located at <https://maxgoldwills.uk>

Cookies

Cookies are small data files stored on your computer as you browse the Internet. Some websites use these to temporarily store data for various reasons, such as showing you adverts or allowing you to make purchases online.

Our website only uses one cookie, to track whether you have agreed to the use of cookies, as is required by the Privacy and Electronic Communications Regulations.

Our website does not collect or store any personal data in the form of cookies.

Data Collected by Our Website

Our website only collects your personal data if you fill in our “Request a Callback” or “Document Enquiry” forms.

In these instances, the data we collect is limited to the following:

- **“Request a Callback” form:** your name, email address, one telephone number, and a short list of services you are interested in.
- **“Document Enquiry” form:** your name, address, postcode, telephone number(s), email address, and a short list regarding the nature of your enquiry.

When we have dealt with your enquiry as requested via one of these forms, we will erase your personal data unless you decide to become one of our customers, at which point you will be provided a copy of this document in paper or electronic form.

Data Retention

We only store your personal data for as long as it is necessary to do so.

Due to the nature of our business, it is likely that your personal data will be stored with us for many years, possibly until after your death. For example, if we produce a Last Will and Testament for you and you decide to store this document with us, your Executors will need to contact us when you pass and request that we send this document to them. We will not be able to do this without storing your personal data, to ensure that your documents are only released to authorised individuals.

We practice data minimisation, meaning that we only store as much of your personal data as is necessary at any given time for any given purpose. For example, after we have fulfilled your order we will erase any data that was only necessary for its production—such as financial and property data—as we do not require it in order to simply store your original documents.

Your Rights and How to Exercise Them

Under the GDPR you have the following rights:

- The Right to be informed
- The Right of access
- The Right to rectification
- The Right to erasure
- The Right to restrict processing
- The Right to data portability
- The Right to object

To learn about your rights in more detail—or if you wish to lodge a complaint with a supervisory authority—we refer you to the Information Commissioner’s Office at <https://ico.org.uk>

If you wish to exercise your rights under the GDPR, or for any other relevant queries, please email our Data Protection Officer direct at **dpo@maxgoldwills.uk**