



PRIVACY POLICY

Westminster Wills Ltd [™] recognises the importance and significance of data protection. The purpose of this policy is to protect all personal information controlled or processed by the organisation, and ensure an adequate level of awareness to ensure data protection principles are applied across all areas of operation within our Professional Will writers practices.

Personal data is identified and managed in accordance with the data protection risk assessment methodology that endorses the acceptable risk levels.

Our Data Protection Policy is achieved by a stringent set of controls, including policies, processes, procedures and software and hardware functions. These controls are monitored, reviewed and improved by the Board to ensure that specific data protection, security and business objectives are met. This is operated in conjunction with other business management processes, and incorporates the applicable statutory, regulatory and contractual requirements.

In particular, Westminster Wills Ltd[™] are committed to compliance with data protection requirements and good business practices to include:

- Processing personal information only where this is strictly necessary for legal and regulatory purposes, or for legitimate organisational purposes;
- Processing only the minimum personal information required for these purposes;
- Providing clear information to natural persons (including children) about how their personal information can be used and by whom;
- Only processing relevant and adequate personal information;
- Processing personal information fairly and lawfully;
- Maintaining a documented inventory of the categories of personal information processed by the organisation;
- Keeping personal information accurate and where necessary, up-to-date;
- Retaining personal information only for as long as is necessary for legal or regulatory reasons or for legitimate organisational purposes and ensuring timely and appropriate disposal;
- Respecting natural persons' rights in relation to their personal information;
- Keeping all personal information secure;
- Only transferring personal information outside the UK in circumstances where it can be adequately protected;
- Developing and implementing GDPR to enable the data protection policy to be implemented;
- Where appropriate, identifying internal and external interested parties and the degree to which they are involved in the governance of the organisation's;

- Identify workers with specific responsibility and accountability for GDPR;
- Maintain records of processing of personal information.

Our Data Protection Policy Awareness Program is incorporated in our staff induction and training program. The Data Protection policy is readily accessible internally and presented to existing and prospective clients. In addition to employees; suppliers, contractors and sub-contractors of Westminster Wills Ltd are expected to adhere to our Data Protection Policy.

Westminster Wills Ltd [™] operate under the Code of Conduct of STEP are committed to continual improvement and all employees are empowered to take responsibility for data protection, with a robust process for identifying and reporting data breaches in place and subject to regular review.

Through compliance to applicable statutory, regulatory and contractual requirements, and the requirements of the Anti-Money Laundering (AML) and General Data Protection Regulations (GDPR) for the Protection of Personal Information, Westminster Wills Ltd [™] as specialist Will writers and Estate Planning experts can demonstrate confidence, integrity and credibility both internally and externally.

Ian Lees
Managing Director
DATE 10 April 2025

Knowledge base:

Compliance maintains a continuously growing knowledgebase about General Data Protection Reporting (GDPR,) including subregions e.g. DSGVO and CNIL, CCPA, PIPEDA, COPPA, POPIA & other specific laws on compliance relevant to UK, Europe, US and Canada, and Australia

Consent

We work with you and ask you to collaborate and to do this we ask for your consent to protect our data and information. Where you do provide consent we are not able to assist.

Marketing preferences

We would like to keep in touch with you, so please choose how you'd like us to contact you. Please tick as required

Select all _____

Email _____ Phone _____ Post _____ SMS _____

Your details will be protected in accordance with our privacy policy.

Records of Consent

There is a difference between Proof of Consent and Records of Consent.

Although registering user consent before processing personal information is sometimes required under specific privacy laws, there is no legal obligation within the GDPR to keep active records of each website visitor's consent. If the need arises, you must be able to provide proof that shows a particular process did occur in obtaining consent.

Proof of Consent

Proof of consent is created specifically for the GDPR and ePrivacy to adhere to the guidelines for consent registration, and the data minimization principle. It demonstrates the technical protocol implemented on your website. This is how a Proof of Consent document can be understood.

Records of Consent

Records of Consent is to be understood as an extension on Proof of Consent, as the latter is always needed. Records of Consent was created for websites owners outside of

the EU region, that need to adhere to other or extra guidelines. For publishers that use TCF, Records of Consent is required.