Inheritance Planning Company

Privacy Policy

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Responsible Officer: Aidan Adams, Director
ICO Registration Number: Z9605999
Policy Number: 4

1. Who We Are

Inheritance Planning Company (IPC) is an independent private client services company providing wills, lasting powers of attorney, estate planning and estate administration services. Our registered address is:

18 Walsworth Road
Hitchin
Hertfordshire
SG4 9SP

IPC is the data controller for the personal information we hold about you. This means we are responsible for deciding how and why your personal data is used and for ensuring it is handled lawfully and securely.

If you have any questions about this policy or how we handle your data, please contact:

Aidan Adams, Director and Data Controller
Email: a.adams@inheritance.uk.com
Post: 18 Walsworth Road, Hitchin, Hertfordshire, SG4 9SP

2. What Personal Data We Collect

Depending on the services we provide for you, we may collect and hold the following personal data:

- Full name, date of birth, address and contact details
- Family details, including details of spouses, civil partners, children and other beneficiaries
- Financial information, including details of assets, property, savings, investments and liabilities
- Details relevant to the preparation of wills, lasting powers of attorney and estate plans
- Information required for the administration of estates and probate
- Health and care-related information, where relevant to lasting powers of attorney or estate planning

- Identity verification documents, such as copies of passports or driving licences

Some of this information, such as health data, is classed as special category data under UK GDPR and is subject to additional protections. We will only collect and use such data where it is necessary to provide the service you have requested.

3. How We Collect Your Data

We collect personal data:

- Directly from you, during consultations, via email, telephone, post or through our website
- From third parties acting on your behalf, such as other legal advisers or financial planners
- From publicly available sources, such as HM Land Registry or Companies House, where necessary

4. Why We Use Your Personal Data

We use your personal data for the following purposes:

To provide our services to you

The primary reason we hold your data is to deliver the services you have engaged us to provide — preparing wills, lasting powers of attorney, estate plans or administering an estate. Our lawful basis for this processing is the performance of a contract with you.

To comply with our legal obligations

We may be required to process your data to comply with legal or regulatory obligations, such as identity verification, anti-money laundering checks, or responding to lawful requests from public authorities.

To protect your interests

In certain circumstances, we may need to process your data to protect your vital interests or those of another person — for example, in an emergency involving a client for whom we hold lasting power of attorney.

For marketing purposes

We will only contact you with updates, newsletters or information about our services if you have given us your express written consent to do so. You may withdraw this consent at any time by contacting us at the address above.

5. How Long We Keep Your Data

Given the nature of private client work, we retain data for extended periods to ensure we can assist you, your family and your estate when needed:

- **Wills, lasting powers of attorney and associated estate planning documents:** retained for 90 years, or until the data is no longer relevant to you or IPC

- **Estate administration and probate records:** retained for 50 years, or until the data is no longer relevant

When data is no longer required, paper records are securely shredded and electronic records are permanently deleted. We periodically review the data we hold to ensure it remains relevant and necessary.

6. Who We Share Your Data With

We do not sell your personal data to third parties. We may share your data with:

- Third parties you have instructed us to work with, such as financial advisers, accountants or other legal professionals involved in your matter
- Courts, government bodies and public authorities, where required by law — for example, HM Courts and Tribunals Service in probate matters, or HMRC
- Our technology and systems providers, who process data on our behalf as data processors — including our cloud storage provider (Dropbox) and other IT systems. These providers are contractually required to handle your data securely and in accordance with UK GDPR

All third parties with whom we share your data are required to keep it confidential and to use it only for the purposes for which it was shared.

7. Your Rights

Under UK GDPR, you have the following rights in relation to your personal data:

- **The right to access —** you can request a copy of the personal data we hold about you
- **The right to rectification —** you can ask us to correct any inaccurate or incomplete data
- **The right to erasure —** in certain circumstances, you can ask us to delete your personal data
- **The right to restrict processing —** you can ask us to limit how we use your data in certain circumstances
- **The right to data portability —** you can ask us to provide your data in a structured, commonly used format
- **The right to object —** you can object to us processing your data for marketing purposes at any time
- **The right to withdraw consent —** where we rely on your consent to process data, you can withdraw it at any time

To exercise any of these rights, please contact Aidan Adams using the details in Section 1. We will respond within one calendar month of receiving your request. For complex or multiple requests, we may extend this to three months and will notify you accordingly.

If you are unhappy with how we have handled your personal data, you have the right to lodge a complaint with the Information Commissioner's Office (ICO) at ico.org.uk or by calling 0303 123 1113.

8. How We Keep Your Data Secure

We take the security of your personal data seriously. Our measures include:

- Password protection and virus software on all computers and devices used to access IPC data
- Secure, encrypted cloud storage for electronic records
- Physical security measures at our offices, including locked storage for paper records
- Secure postal procedures for high-risk documents
- Regular staff training on data protection responsibilities

In the event of a data breach that is likely to affect your rights and freedoms, we will notify you and the ICO as required by law, within 72 hours of becoming aware of the breach.

9. Changes to This Policy

We may update this privacy policy from time to time. The current version will always be available on our website. Where changes are significant, we will notify you directly.

IPC is an independent private client services company registered with the Information Commissioner's Office (ICO Registration No. Z9605999). This policy is reviewed annually.