

Updated 3 August 2026

Privacy Notice

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This **NOTICE** applies to:

- (1) Alexander Wills & Probate Limited whose registered office is at 18A Quay View, Union Quay, North Shields, NE30 1HJ (the **Firm**);
- (2) Employees of the Firm;
- (3) Contacts of the Firm, including but not limited to:
 - a. Clients of the Firm;
 - b. Members of the public who contact the Firm, or visitors to the Firm's website and/or social media profiles; and
 - c. Other organisations.

1. INTRODUCTION

The Firm takes privacy seriously and we are committed to protecting it. We comply with all applicable legislation, including UK General Data Protection Regulation (**UK GDPR**) and the Data Protection Act 2018 (as amended by the Data (Use and Access) Act 2025, collectively '**UK Data Protection Legislation**'). This notice may change from time to time and any updates will be published on our website.

2. THE TYPE OF PERSONAL INFORMATION WE COLLECT

2.1 The Firm collects and process the following information:

- 2.1.1 personal identifiers, contacts and characteristics (for example names);
- 2.1.2 contact telephone numbers, including landline and mobile, if applicable;
- 2.1.3 addresses, including postal and email, if applicable; and
- 2.1.4 dates of birth.

3. HOW WE GET THE PERSONAL INFORMATION AND WHY WE HAVE IT

3.1 Most of the personal information we process is provided to us directly from clients for one of the following reasons:

- 3.1.1 to ensure the client is the correct person giving instructions, for example the correct person instructing us to draft a will;
- 3.1.2 to ensure we can identify the client before discussing sensitive information with them, for example, if they contact us to discuss their matter, we must ensure we are speaking with the correct person;
- 3.1.3 for compliance with Money Laundering Regulations; and
- 3.1.4 for best practice in compliance with the CILEx Code of Conduct.

3.2 We also receive personal information indirectly, from the following sources in the following scenarios:

- 3.2.1 via the 'book an appointment' page on our website, which requires users to input their name and a contact telephone number and / or email address; or
 - 3.2.2 via social media, again by including the user's name and contact details.
- 3.3 We use the information given to us in order to:
 - 3.3.1 contact the correct person in connection with their query or matter (if they have instructed us);
 - 3.3.2 draft legal documents on behalf of clients, including wills, Lasting Powers of Attorney etc.; and
 - 3.3.3 to identify the correct person in accordance with 3.1 above.
- 3.4 Depending on the service we have been instructed to carry out, we may share this information with:
 - 3.4.1 CILEx Regulation (who as the Firm's regulator, may from time to time undertake audits of the Firm's work to ensure compliance with the CILEx Code of Conduct and other regulatory requirements;
 - 3.4.2 The Office of the Public Guardian;
 - 3.4.3 HM Court & Tribunal Service;
 - 3.4.4 HM Land Registry;
 - 3.4.5 The Legal Ombudsman (if a complaint is made against us);
 - 3.4.6 The Probate Registry; or
 - 3.4.7 Banks and other organisations on the client's behalf.
- 3.5 Under UK Data Protection Legislation, the lawful basis for processing this information are:
 - 3.5.1 the client's / user's consent, which they are able to withdraw at any time. Withdrawals of consent can be done by contacting us on 0191 307 7150 or info@alexanderlegal.co.uk;
 - 3.5.2 we have a contractual obligation;
 - 3.5.3 we have a legal obligation;
 - 3.5.4 we have a vital interest;
 - 3.5.5 we need it to perform a public task; or
 - 3.5.6 we have a legitimate interest.

4. HOW WE STORE PERSONAL INFORMATION

- 4.1 Personal information is securely stored:
 - 4.1.1 at our office (if a written record); or
 - 4.1.2 on our Microsoft hosted system.

- 4.2 For clients who instruct us, we will keep a file of papers (predominantly electronic) for a period of 6 years after the date of the final bill was sent to you, with copies of any identity documents provided being kept for 5 years. We will then dispose of your information by shredding or secure destruction of electronic records. For non-clients, we will destroy any personal information you provide us as soon as it becomes apparent that you will not instruct us or do not require us to store your information.

5. YOUR DATA PROTECTION RIGHTS

- 5.1 Under UK Data Protection Legislation, you have rights including:

- 5.1.1 your **right of access** - you have the right to ask us for copies of your personal information;
- 5.1.2 your **right to rectification** - you have the right to ask us to rectify personal information you think is inaccurate. You also have the right to ask us to complete information you think is incomplete;
- 5.1.3 your **right to erasure** - you have the right to ask us to erase your personal information in certain circumstances;
- 5.1.4 your **right to restriction of processing** - you have the right to ask us to restrict the processing of your personal information in certain circumstances;
- 5.1.5 your **right to object to processing** - you have the right to object to the processing of your personal information in certain circumstances;
- 5.1.6 your **right to data portability** - you have the right to ask that we transfer the personal information you gave us to another organisation, or to you, in certain circumstances; and
- 5.1.7 your **right to challenge automated decisions** - you have the right to request 'meaningful human involvement' and challenge significant decisions made solely by automated means.

- 5.2 You are not required to pay any charge for exercising your rights. If you make a request, we have one month to respond to you. Please note that this time limit may be paused ('stop the clock') if we need to ask you for more information to confirm your identity or clarify your request. Please contact us on 0191 307 7150 or info@alexanderlegal.co.uk if you wish to make a request.

6. HOW TO COMPLAIN

- 6.1 If you have any concerns about our use of your personal information, you must make a complaint to us first on 0191 307 7150 or info@alexanderlegal.co.uk. We are obliged to implement a complaints procedure and will acknowledge and respond to your complaint within 30 days.
- 6.2 If you are unhappy with our response to your complaint, you can then complain to the Information Commissioner's Office (ICO). The ICO's address is:

Information Commissioner's Office
Wycliffe House
Water Lane
Wilmslow
Cheshire
SK9 5AF

T: 0303 123 1113 W: www.ico.org.uk

7. REVIEW

This notice, and all other policies and procedures are reviewed annually, or sooner, if the need arises, by the Firm's principal, Shaun Alexander.