

Customer Privacy Notice

This privacy notice tells you what to expect us to do with your personal information.

Table of contents

Contact details

What information we collect, use, and why

Lawful bases and data protection rights

Where we get personal information from

How long we keep information

Who we share information with

How to complain

Contact details

Telephone

07354 628906

Email

lauryn@atlaswills.co.uk

‘We’ are Lauryn Halpin, trading as Atlas Wills & Estates, a sole trader providing will writing and estate planning services in the Home Counties and nationwide across England & Wales.

What information we collect, use, and why

We collect or use the following information to provide and improve products and services for clients:

- Names and contact details
- Addresses
- Gender
- Pronoun preferences
- Occupation
- Date of birth
- Marital status
- Third party information (such as family members or other relevant parties)
- Financial data (including income and expenditure)
- Transaction data (including details about payments to and from you and details of products and services you have purchased)
- Usage data (including information about how you interact with and use our website, products and services)
- Information relating to compliments or complaints
- Video recordings (e.g. video calls)
- Audio recordings (e.g. calls)
- Records of meetings and decisions
- Account access information
- Website user information
- We collect or use the following personal information for the operation of client or customer accounts:
 - Names and contact details
 - Addresses
 - Purchase or service history
 - Account information, including registration details

Marketing preferences

We collect or use the following personal information for information updates or marketing purposes:

- Names and contact details
- Marketing preferences
- Purchase or account history
- Website and app user journey information

We collect or use the following personal information to comply with legal requirements:

- Contact information
- Identification documents
- Any other personal information required to comply with legal obligations
- Safeguarding information

Lawful bases and data protection rights

Under UK data protection law, we must have a “lawful basis” for collecting and using your personal information. There is a list of possible [lawful bases](#) in the UK GDPR. You can find out more about lawful bases on the ICO’s website.

Which lawful basis we rely on may affect your data protection rights which are set out in brief below. You can find out more about your data protection rights and the exemptions which may apply on the ICO’s website:

Your right of access - You have the right to ask us for copies of your personal information. You can request other information such as details about where we get personal information from and who we share personal information with. There are some exemptions which means you may not receive all the information you ask for. [Read more about the right of access.](#)

Your right to rectification - You have the right to ask us to correct or delete personal information you think is inaccurate or incomplete. [Read more about the right to rectification.](#)

Your right to erasure - You have the right to ask us to delete your personal information. [Read more about the right to erasure.](#)

Your right to restriction of processing - You have the right to ask us to limit how we can use your personal information. [Read more about the right to restriction of processing.](#)

Your right to object to processing - You have the right to object to the processing of your personal data. [Read more about the right to object to processing.](#)

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. [Read more about the right to data portability.](#)

Your right to withdraw consent – When we use consent as our lawful basis you have the right to withdraw your consent at any time. [Read more about the right to withdraw consent.](#)

If you make a request, we must respond to you without undue delay and in any event within one month.

To make a data protection rights request, please contact us using the contact details at the top of this privacy notice.

Our lawful bases for the collection and use of your data

Our lawful bases for collecting or using personal information to provide and improve products and services for clients are:

Contract – we have to collect or use the information so we can enter into or carry out a contract with you. All of your data protection rights may apply except the right to object.

Legitimate interests – we’re collecting or using your information because it benefits you, our organisation or someone else, without causing an undue risk of harm to anyone. All of your data protection rights may apply, except the right to portability. Our legitimate interests are:

- We collect and use personal information as part of legitimate interests in providing professional will writing and estate planning services. This includes contacting clients, understanding their personal and family circumstances, preparing legal documents in line with their instructions, maintaining accurate records, and improving services.
- The processing of this information is necessary to deliver services that clients reasonably expect when engaging us. We only collect information that is relevant and proportionate to the service being provided and take steps to protect clients’ privacy and confidentiality at all times.
- The benefits of processing this information include accurate advice, properly prepared documents, effective communication, and continuity of service. These benefits outweigh any minimal privacy impact, as data is handled securely, is not used in a way that would cause harm, and clients’ rights and interests are always respected.

For more information on our use of legitimate interests as a lawful basis you can contact us using the contact details set out above.

Our lawful bases for collecting or using personal information for the operation of client or customer accounts are:

Contract – we have to collect or use the information so we can enter into or carry out a contract with you. All of your data protection rights may apply except the right to object.

Legitimate interests – we’re collecting or using your information because it benefits you, our organisation or someone else, without causing an undue risk of harm to anyone. All of your data protection rights may apply, except the right to portability. Our legitimate interests are:

- We process personal information under legitimate interests to operate and manage client accounts effectively. This includes setting up and maintaining client records, communicating with clients, managing appointments, keeping documentation up to date, and ensuring continuity of service. This processing is necessary to deliver professional will writing and estate planning services that clients reasonably expect when engaging us.
- Only information that is relevant and proportionate is collected, and it is handled securely and confidentially. The use of this information benefits clients by enabling accurate record-keeping, clear communication, and efficient management of their instructions. Any impact on privacy is minimal and is outweighed by the need to provide a reliable and professional service, while respecting clients’ rights and interests at all times.

For more information on our use of legitimate interests as a lawful basis you can contact us using the contact details set out above.

Our lawful bases for collecting or using personal information for information updates or marketing purposes are:

Legitimate interests – we’re collecting or using your information because it benefits you, our organisation or someone else, without causing an undue risk of harm to anyone. All of your data protection rights may apply, except the right to portability. Our legitimate interests are:

- We process limited personal information under legitimate interests to provide information updates to existing clients or individuals who have previously made an enquiry about our services. This may include responding to enquiries, providing updates about services, or sharing information that is relevant to will writing and estate planning. This processing is carried out in a reasonable and proportionate way and only where individuals would reasonably expect to receive such communications.
- We do not send unsolicited marketing communications, and personal information is not shared with third parties for marketing purposes. Any impact on individuals’ privacy is minimal, and individuals can opt out of receiving such communications at any time. Their rights and interests are not overridden.

For more information on our use of legitimate interests as a lawful basis you can contact us using the contact details set out above.

Our lawful bases for collecting or using personal information to comply with legal requirements:

Contract – we have to collect or use the information so we can enter into or carry out a contract with you. All of your data protection rights may apply except the right to object.

Legitimate interests – we’re collecting or using your information because it benefits you, our organisation or someone else, without causing an undue risk of harm to anyone. All of your data protection rights may apply, except the right to portability. Our legitimate interests are:

- We process personal information under my legitimate interests in order to comply with applicable legal and regulatory requirements relevant to my business. This includes maintaining accurate records, responding to complaints or legal queries, meeting professional and insurance requirements, and demonstrating compliance where required. This processing is necessary to operate the business lawfully and responsibly and to protect both clients and ourselves.
- Only information that is relevant and proportionate is retained, access is restricted, and data is handled securely. The benefit of this processing is accountability, legal compliance, and the protection of clients’ interests. Any impact on individuals’ privacy is minimal and outweighed by the need to meet these requirements fairly and transparently.

For more information on our use of legitimate interests as a lawful basis you can contact us using the contact details set out above.

Where we get personal information from

Directly from you

How long we keep information

We retain all personal data and documents relating to wills and estate planning for ten years following the death of the individual concerned. After this period, all personal data and documents are securely destroyed.

For more information on how long we store your personal information or the criteria we use to determine this please contact us using the details provided above.

Who we share information with

Data processors

Will Writing Software

We use Will Writing Software as a data processor. This service stores and manages client data on our behalf, allowing us to generate, update, and maintain wills and estate planning documents securely. All data is processed in accordance with our instructions and for the sole purpose of providing our services.

Secure Document Portal

We use a Secure Document Portal as a data processor. This service stores and manages client data on our behalf, allowing us to share documentation (including wills and estate planning documents) securely. All data is processed in accordance with our instructions and for the sole purpose of providing our services.

Identification & Address Check Providers

We use Identification & Address Check Providers as a data processor. This service stores and manages client data on our behalf, allowing us to complete identification and address information, in compliance with UK anti-money laundering (AML) regulations and other legal requirements. Checks may include:

- Verification of government-issued ID (passport, driving license, etc.)
- Address verification via utility bills, bank statements, or official records
- Cross-referencing against public and private databases for fraud prevention

All data is processed strictly in accordance with our instructions and for the sole purpose of providing our services.

Others we share personal information with

Organisations we're legally obliged to share personal information with

How to complain

If you have any concerns about our use of your personal data, you can make a complaint to us using the contact details at the top of this privacy notice.

If you remain unhappy with how we've used your data after raising a complaint with us, you can also complain to the ICO.

The ICO's address:

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

Helpline number: 0303 123 1113

Website: <https://www.ico.org.uk/make-a-complaint>