
WILLSONS PRIVACY NOTICE

Introduction

Willsons take your privacy seriously and respect your privacy. We understand that your privacy is important to you and that you care about how your personal data is used.

We respect and value the privacy of all our clients and we are committed to protecting your personal data.

We will only collect and use personal data in ways that are described here, and in a way that is consistent with our obligations and your rights under the law.

We invite you to read and consider our privacy notice as it contains important information and explains how we look after your personal data.

Information About Willsons

WILLSONS SOLICITORS is a law firm, solicitors practice, operating in the United Kingdom.

Partnership, registered in England.

Senior partner; Heather Louise Wolfe

Other Partners; Peter Tustain Annamaria Stanford and Ashlee Grayson-Smith

Postal address; Coton Chambers, 35 Coton Road, Nuneaton, Warwickshire CV11 5TW.

VAT number: 455802737

We are regulated by the SRA Solicitors Regulation Authority -8006878

The partners are members of The Law Society

Data Protection Lead: A Stanford

Email address: astanford@willsonslegal.co.uk

Telephone number 02476387821

Willsons is a 'data controller' for the purposes of the Data Protection Legislation.

Changes to this Privacy Notice

We may change this Privacy Notice from time to time. This may be necessary, for example, if the law changes, or if we change our business in a way that affects personal data protection. Any changes will be made available on our website.

This Privacy Notice was last updated on 22 June 2026

If your personal data changes then please ensure that you notify ourselves so that we maintain true and accurate information about you. It is important that your personal data is kept accurate and up-to-date. If any of the personal data we hold about you changes, please keep us informed for as long as we hold that data.

1. **What Does This Privacy Notice Cover?**

This Privacy Information explains how we use your personal data: how it is collected, how it is held, and how it is processed. It also explains your rights under the law relating to your personal data.

2. **What Is Personal Data?**

Personal data is defined by the UK GDPR and the Data Protection Act 2018 and the Data (Use and Access) Act 2025 (collectively, “the Data Protection Legislation”) as ‘any information relating to an identifiable person who can be directly or indirectly identified in particular by reference to an identifier’.

Personal data is, in simpler terms, any information about you that enables you to be identified.

Personal data covers obvious information such as your name and contact details, but it also covers less obvious information such as identification numbers, electronic location data, and other online identifiers.

The personal data that we use is set out in Part 3, below.

3. **What Personal Data Do You Collect and How?**

We may collect and hold personal data relating to an individual or a contractor or supplier.

The table provides information on what types of data we collect, and why we would use that data is exemplified in the table.

We may collect special category’ or ‘sensitive’ personal data.

We may collect data from your partner

We do not collect personal data from children.

We do not collect data relating to criminal convictions and/or offences.

Data Collected	How We Collect the Data
1. Client or prospective client Identity Information including your title first and last name, date of birth, national insurance number, passport or driving licence number, utility bills and other financial information as is required and or deemed necessary to verify your ID and or communicate	Direct interaction with the client or individual either face to face, by teams or similar, telephone, email, post. And or by completing documents as produced by this firm and provided for completion, thereafter, corresponding with ourselves accordingly. This is to enable us to provide the correct service And To enable us to verify your identity and enable us to carry out ID checks in compliance with the firms AML policies

2.	Client contact information to include address, business address as aforementioned, email address and telephone number, job title or profession	Direct interaction with the client or individual either face to face, by teams or similar, telephone, email, post, and or by completing documentation as provided to ourselves and in corresponding with ourselves accordingly to enable us to communicate with you.
4.	In limited circumstances as is necessary and in accordance with your instructions, sensitive category personal data (and where relevant) to include sex, marital status, partners details, physical or mental health problems, race and ethnic origin, religious beliefs	Direct interaction with the client or individual supplier or contractor. Either face to face, by teams other similar, telephone, email, post, and or by completing documentation as provided to ourselves and in corresponding with ourselves accordingly. In providing the data information as detailed in 1-3 we are able to open a file, send out terms of business letters, secure monies on account of costs, conflict of interest checks, risk assessments and any other regularity or compliance checks that are needed
5.	Payment information including client and bank or building society details.	Direct interaction with the client or individual either face to face, by teams or similar, telephone, email, post, and or by completing documentation as provided, to ourselves and in corresponding with ourselves accordingly. To enable us also to verify and undertake credit or financial checks and source of funding when purchasing property
6.	Data from another source or third party	Basic data name address and email address, telephone number to respond and send information as requested. Visitors to our website ; A prospective client, and or contacted ourselves through our website by way of enquiry And Download and use our Willson Solicitors Portal mobile app, available on Apple app store and Google play store. Or As referred to our firm by a third party and/or information has been provided to ourselves from a third party about you. Publicly available sources ; Companies house, local authorities, The land registry, The Court, Professional networking; LinkedIn Professional advisers Compliance/due diligence providers

7.	Data from connected parties	A client has provided us with information about you to enable us to contact you, as a prospective client. Data from your partner.
8.	Suppliers and contractors or other service provider and people who do business with us or register an interest in our services	In engaging with third party service providers we may enter into agreements with them which involves data being processed as set out in this privacy notice, in the course of our business
9	Internal sources.	Internal services within our company to provide information regarding our services with your consent.

9. How Do You Use My Personal Data?

Under the Data Protection Legislation, we must always have a legal and lawful basis for using personal data with your consent to do so.

With your permission and/or were permitted by law, we may also use your personal data to contact you by email or telephone or post with information, news, and offers on other services that this firm provides

You will not be sent any unlawful marketing or spam.

We will only use your personal data for the purpose(s) for which it was originally collected unless we reasonably believe that another purpose is compatible with that or those original purpose(s) and need to use your personal data for that purpose.

If we do use your personal data in this way and you wish us to explain how the new purpose is compatible with the original, please contact us using the details in Part 10.

If we need to use your personal data for a purpose that is unrelated to, or incompatible with, the purpose(s) for which it was originally collected, we will inform you and explain the legal basis which allows us to do so.

In some circumstances, where permitted or required by law, we may process your personal data without your knowledge or consent. This will only be done within the bounds of the Data Protection Legislation and your legal rights.

The following table describes how we will or may use your personal data, and our lawful bases for doing so:

What We Do	What Data We Use	Our lawful basis
1. Administration of our business	Personal data as detailed at 3, file management.	To perform daily operations as is required to enable the running of our business. To comply with any legal obligations. To enable us to ensure correct office management and operations.

		Financial management, ie to track expenditure and profitability monitor cash flow. Human resources connected to recruitment training and performance evaluation and staff motivations, restructuring. Strategic planning with objectives and system analysis.
2. Providing our services to you.	Personal data as detailed at 3 for the purpose of communication.	To perform the contract that we have entered into with you and with your agreement and consent, to enable us to achieve the outcome that is sought by you.
3. Managing payments and paying for our services.	Personal data as detailed at 3	Financial management To perform the contract that we have entered with you, with your authority and consent, authorisation and consents regarding your bank details to make and receive payments..
4. To protect our business	Personal data as detailed at 3.	To protect the firm from fraud
5. IT and other services	Address and email address.	As is needed and required for the running of our business. To address troubleshooting or IT problems and issues.
6. Compliance	Personal data as detailed at 3	In the firm's legitimate interest to comply with our regulators

We will always work to fully protect your rights and comply with our obligations under the Data Protection Legislation and the Privacy and Electronic Communications (EC Directive) Regulations 2003, and you will have the opportunity to opt-out.

10. Do You Share My Personal Data?

We will not share any of your personal data with any third parties for any purposes, without your consent but subject to the following exceptions.

If we sell, transfer, or merge parts of the business or assets, your personal data may be transferred to a third party. Any new owner of our business may continue to use your personal data in the same way(s) that we have used it, as specified in this Privacy Policy.

In some limited circumstances, we may be legally required to share certain personal data, which might include your data, if we are involved in legal proceedings or complying with legal obligations, therefore a legitimate interest, a court order, or the instructions of a government authority.

We may need to contract with third parties, this list is not exhaustive.

Recipient	Activity Carried Out	Sector	Location
1 Other law firms acting as our agent, valuers estate agents GP, Medical and Hospitals, Local authorities, barristers	To carry out services as instructed by our client.	Legal.	UK
2. Courts, Guardians, welfare officers	Provision of legal services	Legal	UK
3. Legal Ombudsman and the Information Commissioner, the SRA	Legal obligations Complaints and data Breaches and compliance	Legal	UK
4. External and internal Auditors	To monitor and comply with quality compliance, legal regulations and obligations	Legal	UK
5. AML ID verification	To enable us to identify our client to enable us to carry out our services to you and	Legal	UK

11. How Long Will You Keep My Personal Data?

We will not keep your personal data for any longer than is necessary considering the reason(s) for which it was first collected.

As is necessary for auditing and accounting and or satisfying any legal requirements.

Your personal data will therefore be kept for the following periods following file closure (or, where there is no fixed period, factors will be used to determine how long it is kept).

We also refer to this firms Retention Policy:

Type of Data	How Long We Keep It
1. Paper files; Private	All Paper files which hold personal data are destroyed after a period of 6 years.
2. Paper file. Public law matters (minors)	Paper files are destroyed 7 years after the date the child attains the age of 18 years.
3. Accounts; Payment information including card details, bank and building society account numbers.	180 days
4. Wills and Codicils and active Trusts and active LPA's and deeds	Indefinitely
5. General enquiries by email or telephone	1 year

12. How and Where Do You Store or Transfer My Personal Data?

Generally, we will only store your personal data in the UK. This means that it will be fully protected under the Data Protection Legislation.

In some circumstances dependant on the transaction or service that is required we may need to store some or all of your personal data in countries outside of the UK.

We will only store or transfer personal data in or to countries that are deemed to provide an adequate level of protection for personal data. For further information about adequacy decisions and adequacy regulations, please refer to the [Information Commissioner's Office](#) (now the IC).

Please contact us using the details below in Part 11 for further information about the particular data protection safeguards used by us when transferring your personal data to a third country.

The security of your personal data is essential to us and to protect your data we take several important measures, including the following:

- limiting access to your personal data to those employees, agents, contractors, and other third parties with a legitimate need to know only and ensuring that they are subject to duties of confidentiality;
- procedures for dealing with data breaches (the accidental or unlawful destruction, loss, alteration, unauthorised disclosure of, or access to, your personal data) including notifying you and/or the Information Commissioner's Office (The IC) where we are legally required to do so;

If any of your personal data is shared with a third party, as described above, we will take steps to ensure that your personal data is handled safely, securely, and in accordance with your rights, our obligations, and the third party's obligations under the law, as described above in Part 8.

If any personal data is transferred outside of the UK, we will take suitable steps to ensure that your personal data is treated just as safely and securely as it would be within the UK and under the Data Protection Legislation, as explained above.

If we sell, transfer, or merge parts of our business or assets, your personal data may be transferred to a third party. Any new owner of our business may continue to use your personal data in the same way(s) that we have used it, as specified in this Privacy Policy.

In some limited circumstances, we may be legally required to share certain personal data, which might include your data, ie. if we are involved in legal proceedings or complying with legal obligations, a court order, or the instructions of a government authority.

13. **What Are My Rights?**

Under the Data Protection Legislation, you have the following rights, which we will always work to uphold. You can always contact us to find out more or to ask any questions using the details in Part 10.

Collection access and use of data

The right to be informed about our collection and use of your personal data.

Rectification

The right to have your personal data rectified if any of your personal data held by us is inaccurate or incomplete.

Erasure

The right to be forgotten, i.e. the right to ask us to delete or otherwise dispose of any of your personal data that we hold.

Restrict processing

The right to restrict (i.e. prevent) the processing of your personal data.

Particular purpose

The right to object to us using your personal data for a particular purpose or purposes.

Withdraw consent

The right to withdraw consent. This means that, if we are relying on your consent as the legal basis for using your personal data, you are free to withdraw that consent at any time.

Portability

The right to data portability. This means that, if you have provided personal data to us directly, we are using it with your consent or for the performance of a contract, and that data is processed using automated means, you can ask us for a copy of that personal data to re-use with another service or business in many cases.

Automated decision making

Rights relating to automated decision-making and profiling. we do not use your personal data in this way

14. How Can I Access My Personal Data?

If you want to know what personal data we have about you, you can ask us for details of that personal data and for a copy of it where any such personal data is held.

This is known as a “subject access request”.

All subject access requests should be made in writing and sent to the email or postal addresses shown in Part 10.

To make this as easy as possible for you, a Subject Access Request Form is available for you to use. You do not have to use this form, but it is the easiest way to tell us everything we need to know to respond to your request as quickly as possible.

There is not normally any charge for a subject access request. If your request is ‘manifestly unfounded or excessive’ (for example, if you make repetitive requests) a fee may be charged to cover our administrative costs in responding.

We will respond to your subject access request within 30 days and, in any case, not more than one month of receiving it.

Normally, we aim to provide a complete response, including a copy of your personal data within that time. In some cases, however, particularly if your request is more complex, more time may be required up to a maximum of three months from the date we receive your request. You will be kept fully informed of our progress.

15. How Do I Contact You?

To contact us about anything to do with your personal data and data protection, including to make a subject access request, please use the following details for the attention of;

A Stanford

Email address: astanford@willsons;legal.co.uk

Telephone number: 02476387821.

Postal Address: Coton Chambers, 35 Coton Road, Nuneaton Warwickshire CV11 5TW.

16. Complaint about your data

If you have any cause for complaint about our use of your personal data, you have the right to lodge a complaint.

If we fail to respond to your request for your personal information;

Do not keep your information secure;

If we hold inaccurate information about you;

If we disclose information about you;

If we keep information about you for longer than is necessary;

If we collect information for one reason and is using it for something else; or

If we fail to uphold any of your data protection rights.

Complaints

This firm take complaints seriously and would welcome the opportunity to resolve your complaint.

This firm has a policy and process for handling data protection complaints.

We will;

- a. Provide a form for the purpose of making your complaint
- b. Acknowledge your complaint within 30 days of receipt.
- c. Respond to your complaint without delay and keep you fully appraised and informed.
- d. Provide the outcome to you.

If you would like to make a data protection complaint the please contact us first, using the details in Part 10

Further information about your rights can also be obtained from the Information Commissioner's Office or your local Citizens Advice Bureau.

If you are not satisfied regarding the handling of your complaint you may take your complaint to the Information Commissioner Office –

www.ico.org.uk

Telephone 0303 123 1113