



BUCKINGHAM
GATE

PRIVACY
POLICY

PRIVACY POLICY

We take data privacy seriously and this privacy notice explains how we use any personal information we collect about you.

When using our website, this privacy notice should be read alongside the website Terms and Conditions.

PERSONAL DATA

In the EU's General Data Protection Regulation (GDPR), Personal Data is defined as "...any information relating to an identified or identifiable natural person ("data subject"); an identifiable person is one who can be identified, directly or indirectly, in particular by reference to an identifier such as a name, an identification number, location data, online identifier or to one or more factors specific to the physical, physiological, genetic, mental, economic, cultural or social identity of that person."

WHAT INFORMATION DO WE COLLECT ABOUT YOU?

We collect information about you when you engage us for Estate Planning services either online, via email, via telephone or in person. We also collect information about you when you sign up to attend one of our free seminars or when you request and download one of our Estate Planning guides via our website or advertising partners.

Personal information is any information that concerns you individually, such as your name, address, telephone number, email address and your preferences in receiving information from our advertising partners. We may also collect information when you voluntarily complete client surveys or provide feedback to us.

We (and, if appropriate, our advertising partners) may also use your personal information (utilising any of the means of contact you have provided) to provide you with information about other products, programmes or services we believe may be of interest to you provided you have consented to being contacted in this way. Buckingham Gate may on occasion combine information we receive online with outside records to enhance our ability to market to you those products or services that may be of interest to you.

When you submit your personal information on the website, you are giving your consent to the collection, use and disclosure of such information as set forth in this Privacy Policy.

If you do not want to receive information on other products and services, please contact us via email: contact@buckinghamgate.co.uk or write to us.

WHY DO WE NEED TO COLLECT AND USE YOUR PERSONAL DATA?

The primary basis that we intend to use for the processing of your data is for the performance of our contract with you. We will have received the personal information from yourself, via a means as mentioned above. The information we collect from you is essential for us to be able to carry out the services that you require from us effectively. Without collecting your personal data, we would also be unable to fulfil our legal and regulatory obligations.

Where special category data is required, we will obtain your explicit consent to collect and process this.

Calls to and from Buckingham Gate are monitored and recorded to enhance security, accuracy and protection.

Meetings are recorded to ensure the accuracy of our advice and to make sure that instructions are interpreted and actioned correctly.

HOW WILL WE USE THE INFORMATION ABOUT YOU?

We collect information about you to provide you with the services for which you engage us. In addition, we use the data we collect for the following purposes:

- To communicate with you about our seminars, webinars or other events you may be interested in (unless you ask us not to).
- To inform you about any new products or services that may be of interest to you (unless you ask us not to).
- To provide updates to you about your case.
- To help us to advise on your case in the future.
- To help us to defend any claims against us.
- To allow us to process your instructions accurately and efficiently.
- To allow us to undergo compliance checks to ensure the quality of our work.
- To assist with staff training and development.

WHO MIGHT WE SHARE YOUR INFORMATION WITH?

If you agree, we may email you about other products or services that we think may be of interest to you.

If you agree, Buckingham Gate may disclose your personal information to its third-party advertising partners and affiliated companies for providing the requested content to you in an efficient manner.

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To deliver our services to you effectively, we may send your details to third parties such as those that we engage for professional compliance, accountancy or legal service.

We may share your information with our partner advisers or affiliates to allow them to provide the Estate Planning service to you.

Where third parties are involved in processing your data, we'll have a contract in place with them to ensure that the nature and purpose of the processing is clear, that they are subject to a duty of confidence in processing your data and that they'll only act in accordance with our written instructions.

Where it is necessary for your personal data to be forwarded to a third party, we'll use appropriate security measures to protect your personal data in transit, such as encryption and password protecting.

To fulfil our obligations in respect of prevention of money-laundering and other financial crime, we may send your details to third party agencies for identity verification purposes.

HOW LONG DO WE KEEP HOLD OF YOUR INFORMATION?

In principle, your personal data should not be held for longer than is required under the terms of our contract for services with you. However, we are subject to regulatory requirements to retain data for specified minimum periods.

We also reserve the right to retain data for longer than this due to the possibility that it may be required to defend a future claim against us.

You have the right to request deletion of your personal data. We will comply with this request, subject to the restrictions of our regulatory obligations and legitimate interests as noted above.

In any case, we will not keep your personal data for longer than is reasonably necessary after our relationship with you has ended.

HOW CAN I ACCESS THE INFORMATION YOU HOLD ABOUT ME?

You have the right to request a copy of the information that we hold about you. If you would like a copy of some or all your personal information, please email or write to us using the contact details noted below.

When your personal data is processed by automated means, you have the right to ask us to move your personal data to another organisation for their use.

We have an obligation to ensure that your personal information is accurate and up to date. Please ask us to correct or remove any information that you think is incorrect.

MARKETING

We would like to send you invitations to our webinars and seminars we host in central London as well as information about our Estate Planning products and services which may be of interest to you.

If you have agreed to receive marketing information, you may opt out later.

You have a right at any time to stop us from contacting you. If you no longer wish to be contacted by us, please unsubscribe, opt out, or call, email or write to us.

COOKIES

To enhance your online experience, we use "cookies". Cookies are text files placed by the website in your computer's browser to store your preferences. Cookies, by themselves, do not tell us your email address or other personal information. However, once you choose to furnish the website with personal information (such as signing up to receive one of the offers made by our third-party advertising partners), this information may be linked to the data stored in the cookie. We use cookies to understand internet usage, enhance the performance of the website, activate special web features and security mechanisms. In addition, we may use cookies to offer you products, programmes, or services.

You always have the option of setting your browser to warn you when a cookie is being accessed on your computer, to delete cookies that are currently on your computer or to decline cookies altogether. However, to take full advantage of the website and its features, your browser will need to accept cookies.

Web beacons (also known as clear gifs) are small, invisible graphic images that may be used on the website and in emails to collect certain information about your use of and activity with the website and emails. If we combine cookies or clear gifs with or link them to any of the personally identifying information, we will treat this information in the same way we treat other personal information. For further information, visit <http://www.allaboutcookies.org/>

OTHER WEBSITES

Our website contains links to other websites. This privacy policy only applies to the Buckingham Gate website, www.buckinghamgate.co.uk, so when you link to other websites you should read their own privacy policies.

WHAT CAN YOU DO IF YOU ARE UNHAPPY WITH HOW YOUR PERSONAL DATA IS PROCESSED?

You also have a right to lodge a complaint with the supervisory authority for data protection. In the UK this is:

Information Commissioner's Office
Wycliffe House, Water Lane,
Wilmslow, Cheshire, SK9 5AF
0303 123 1113 (local rate)

USE OF ARTIFICIAL INTELLIGENCE

We use Artificial Intelligence (AI) tools within our business to help us deliver our services more accurately and efficiently. This includes software used to draft, review, or check documents relating to your Estate Planning matter; AI-generated transcripts or summaries of telephone calls and meetings, for both your and our future reference; and tools that support our internal administration, compliance checks, and case management.

WHAT PERSONAL DATA IS INVOLVED

Where AI tools process personal data on our behalf (for example, to generate a meeting transcript), this may include the same categories of personal data described earlier in this policy, and in some cases special category data if this arises naturally during a meeting or call (for example, health or family circumstances relevant to your estate planning). We only use AI in this way where it is necessary for delivering our services to you.

OUR LAWFUL BASIS

Our lawful basis for this processing is the same as set out above; it is primarily performance of our contract with you, and compliance with our legal and regulatory obligations. Where special category data is involved, we rely on your explicit consent, given at the point that data is collected (for example, at the start of a recorded meeting).

HUMAN OVERSIGHT

We do not use AI to make any decision about you that would have a legal effect or similarly significantly affect you without meaningful human involvement. Any output generated by an AI tool (such as a draft document or meeting summary) is reviewed by a member of our team before it is relied upon or acted on. You will not be subject to a decision based solely on automated processing under Article 22 of the UK GDPR.

THIRD PARTIES AND DATA TRANSFERS

Some of the AI tools we use are provided by third-party software companies. Where this is the case, we have contracts in place with those providers requiring them to protect your personal data, act only on our instructions, and comply with UK data protection law. Where a provider is based outside the UK, we ensure appropriate safeguards are in place before your personal data is transferred (such as the UK's International Data Transfer Agreement or an adequacy decision).

RETENTION

AI-generated transcripts and summaries are retained in line with the retention periods set out earlier in this policy, and are not kept for longer than necessary.

YOUR RIGHTS

Your rights in relation to this processing, including the right to access, correct, or request erasure of your personal data, apply equally to any personal data processed using AI tools. If you have any questions about how we use AI, or wish to object to a call or meeting being processed in this way, please contact us using the details below.

CHANGES TO OUR PRIVACY POLICY

We keep our privacy policy under regular review, and we'll place any updates on this web page (and/or) inform you of any changes when they occur.

HOW TO CONTACT US

Please contact us if you have any questions about our privacy policy or information we hold about you:
by email at contact@buckinghamgate.co.uk;
by post to Buckingham Gate, 68 King William Street, London, EC4N 7HR, or; by telephone on **0203 478 2160**.



Buckingham Gate Estate Planning

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