

# Simply Wills & LPAs

## **AFFORDABLE WILLS&LPAS**

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### CLIENT CARE, TERMS & GDPR INFORMATION – SIMPLY WILLS

#### WELCOME

Thank you for choosing Simply Wills. This document sets out our client care standards, terms of business, complaints procedure, and how we handle your personal data.

#### SERVICES PROVIDED

We provide will writing, lasting powers of attorney (LPA), estate planning, and probate guidance. Our service includes consultation, drafting, amendments, and guidance on execution.

#### YOUR RESPONSIBILITIES

You agree to:

- Provide full and accurate information
- Inform us of any changes
- Carefully review all documents before signing

#### IMPORTANT DISCLAIMER

We prepare documents strictly in accordance with your instructions.

We do not provide financial, tax, or investment advice. We are not responsible for any inheritance tax implications or financial outcomes arising from your estate. Where appropriate, we recommend that you seek independent advice from a qualified financial adviser or solicitor.

If you choose not to instruct us to oversee or complete the execution of your documents, we cannot accept responsibility for any errors or invalidity arising from incorrect execution. It is your responsibility to ensure documents are signed and witnessed correctly unless we are engaged to assist with this process.

#### LIMITATION OF LIABILITY

We cannot be held responsible for errors, omissions, or consequences arising from inaccurate, incomplete, or misleading information provided by you.

#### CONFIDENTIALITY

All information you provide will be treated in the strictest confidence.

## COMPLAINTS PROCEDURE (SOCIETY OF WILL WRITERS COMPLIANT)

We are committed to providing a high standard of service. If you are dissatisfied with any aspect of our service, please follow the procedure below:

1. Contact us in writing with full details of your complaint.
2. We will acknowledge your complaint within 5 working days.
3. We will investigate your complaint fully and provide a written response within 28 days.

If you are not satisfied with our response, you may refer your complaint to the Society of Will Writers, who offer an independent complaints review service.

## BUSINESS CONTINUITY

In the event that we are unable to continue due to illness, incapacity, or unforeseen circumstances:

- Your file may be securely transferred to another regulated professional
- Or returned to you upon request
- All reasonable steps will be taken to minimise disruption

## DATA PROTECTION (GDPR)

### WHAT WE COLLECT

- Personal details (name, DOB, address)
- Family and beneficiary information
- Financial and asset details
- Health information (where relevant to LPAs)

### WHY WE COLLECT IT

- To provide estate planning services
- To meet legal obligations

### LAWFUL BASIS

- Contract
- Legal obligation
- Legitimate interests
- Special category data (where applicable)

### DATA SHARING

We may share your data with:

- Office of the Public Guardian
- HMRC

- Professional advisers where necessary

We do not sell your data.

#### DATA STORAGE

- Secure physical storage
- Password-protected systems

#### DATA RETENTION

We retain your data for a minimum of 6–15 years or longer where necessary.

#### YOUR RIGHTS

You have the right to access, correct, or request deletion of your data.

You may complain to the Information Commissioner's Office if required.

#### CLIENT DECLARATION

I confirm that:

- I have read and understood this document
- I accept the terms of business
- I consent to the processing of my personal data

Signed: \_\_\_\_\_

Name: \_\_\_\_\_

Date: \_\_\_\_\_