

BHF IS A BENEFICIARY

We are the British Heart Foundation (www.bhf.org.uk) and we are using your personal data in relation to the estate of which you and we are beneficiaries.

We are being sent your personal data by the firm of solicitors or Probate Management firm (as appropriate) handling the estate so we can:

- Understand the beneficiaries involved and establish our legacy accurately; and/or
- Liaise with you as a fellow beneficiary if necessary

That will include your name, postal and email address and contact numbers.

We also obtain information about you through various means, such as through but not limited to Smee & Ford, the Probate Registry, solicitors, and friends and family of a deceased.

We share data with other beneficiaries, executors or administrators, our solicitors, the Courts, the Probate Registry, parties challenging the gift(s) or Will, HMRC and others as necessary.

We process your personal data on our FirstClass legacy management system and apply appropriate security to it. The data will be deleted usually 12 years following the year end after closure of the file. Some file data is retained longer for example:

- Files with indemnities are retained for the duration of the indemnity.
- Files with overages are retained for the duration of the overage.
- For files where we have acted as an Executor/ Administrator, the file is retained indefinitely.

You have a right to see the data we have, to correct it, stop its use or have it erased in certain circumstances by contacting us by post to The Data Protection Officer at the Legal and Corporate Governance Department, British Heart Foundation, Greater London House, 180 Hampstead Road, London, NW1 7AW or email dataprotection@bhf.org.uk. You can raise complaints with the Information Commissioner's Office (ICO) – for more details, see <https://ico.org.uk>.

For more information, please see the long privacy notice. We update these notices from time to time.