

## **FULL NOTICE WHEN BHF IS EXECUTOR / ADMINISTRATOR**

### **What this privacy policy covers**

The British Heart Foundation is committed to protecting your personal information and being transparent about what information we hold.

The purpose of this Privacy Policy ('Policy') is to give you a clear explanation about how the BHF collects and uses the personal information (or personal data) you provide to us and that we collect.

### **Information collection**

We collect information about you in the following ways:

- **Information you give us.** For example, when you send us documents, call us, give us your personal information.
- **Information from known third parties.** We may also receive information about you from our third-party partners with whom you choose to interact such as our lawyers or other professional advisers or commercial parties we use in relation to the estate.
- **Information available publicly.** We may include information found in places such as Companies House, LinkedIn, Social Media sites and information that has been published in articles/newspapers/websites.

### **What personal information do we process?**

We collect, store and use the following kinds of personal information:

- Your name and contact details, including postal address, telephone number, email address and, where applicable, your social media profile.
- Your date of birth and gender.
- Financial information you provide or we obtain or are provided with by executors, beneficiaries or other interested parties.
- Any other personal information you share with us.

### **How we use your information**

We use your personal information for a number of purposes including the following:

- To manage the disposition of the estate (see end of this notice for specific information).
- For internal management, such as record keeping of enquiries, feedback or complaints.

- as required or authorised by law.
- fraud prevention (using external specialist agencies to help us).
- Other specific purposes that you may agree to from time to time.

### **Legal basis for processing**

Depending on the purposes for which we use your data, one or more of the grounds listed below may be relevant:

#### **Performance of a contract:**

Where we have entered a contract to administer the estate we need to be able to process your information for the purpose of meeting our contractual obligations.

#### **Legitimate Interest:**

We rely on the “legitimate interest’ ground for processing where we believe it is in the legitimate interests of you, as the data subject, or of the BHF, to process your data.

- Dealing with you and others in relation to the estate.
- Sending relevant communications to you.

#### **Consent:**

We may ask for consent from time to time for identified purposes. You can withdraw that consent at any time.

#### **Legal Obligation:**

We may need to collect, process and disclose personal information to comply with a legal obligation. For example, where we are required to do so to administer the estate at the Probate Registry, to report to HMRC and pay taxes, or if ordered by a court or regulatory authority or to fulfil contractual obligations related to the estate.

### **Your rights**

You have the following legal rights in relation to our collection and processing of your personal information:

- **Right to be informed** – you have the right to be told how your personal information will be used. This Policy and other policies and statements used on this website and in our communications are intended to provide you with a clear and transparent description of how your personal information may be used.
- **Right of access** – you can write to us to ask for confirmation of what information we hold on you and to request a copy of that information (and other related information). Provided we are satisfied that you are entitled to see the information requested and we have successfully confirmed your identity, we will provide you with your personal information subject to any exceptions that apply.
- **Right of erasure** – at your request we will delete your personal information from our records as far as we don't have an overriding legitimate reason for holding on to it (e.g. to comply with a legal obligation).

- **Right of rectification** – if you believe our records of your personal information are inaccurate, you have the right to ask us to update those records. You can also ask us to check the personal information that we hold about you if you are unsure whether it is up to date or not.
- **Right to restrict processing** – you have the right to ask us to restrict the processing of your personal information if there is disagreement about its accuracy or whether our use is legitimate or not.
- **Right to object** – you have the right to object to processing where we are: (i) processing your personal information on the basis of the legitimate interests ground (see 'Legal basis for processing' above) and we have no compelling reason we can demonstrate to continue with that processing; (ii) using your personal information for direct marketing, or; (iii) using your personal information for statistical purposes.

To exercise any of these rights, please send a description of the personal information in question to our Data Protection Office at the address shown in the **Contact us** section below. Please note that some of these rights may be subject to legal restrictions, which we'll tell you about if they apply.

For more information about your rights or if you are not happy with our response to your request, you can contact the Information Commissioner's Office (ICO) – for more details, see <https://ico.org.uk/>.

### **How long does BHF hold my data?**

We keep your personal data only for as long as we need to use it for the purposes set out in this Policy.

Personal information that we no longer need is securely disposed of and/or anonymised so you can no longer be identified from it. Some personal information may be retained by us in archives for statistical or historical research purposes although we will do this in a manner that complies with data protection law.

We continually review what personal information and records that we hold and delete what is no longer required. We never store payment card data after the transaction has been complete.

### **International transfers of personal information**

Your information is normally kept within the UK or within the European Economic Area (EEA) and this is a priority for the BHF when selecting where we host and use your information.

On some occasions, we may have to use services of other parties that host your information outside of these areas. When this occurs, we will only ever use highly reputable suppliers that have gone through our information security due diligence, have contractual clauses about the high standard of data processing, and meet all

requirements that your information is looked after to a standard as if it were in the UK or the EEA. If and when this occurs usually this is a company in the USA.

If you have any queries about this privacy and / or cookies policy please contact 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](mailto:dataprotection@bhf.org.uk)

### **Changes to this Privacy Policy**

The Policy may change from time to time. Our up-to-date Policy will be contained in the footer of each email we send to you, and you may ask us for the updated version by emailing us so you know the changes in our Policy as they apply to you and your personal data from time to time.

For more information about this please contact us using the Contact Us section below.

### **Contact us**

If you would like to receive further information about this Policy or any of our safeguards, please contact the Data Protection Office, Legal and Corporate Governance Department, British Heart Foundation, 180 Hampstead Road, London NW1 7AW or email: [dataprotection@bhf.org.uk](mailto:dataprotection@bhf.org.uk).