

Testator(s) Declaration

Service	Taken	Service	Taken
Wills	Yes / No	Nil Rate Band Trust	Yes / No
Storage	Yes / No	Discretionary Trust	Yes / No
Full/Half Property Trust	Yes / No	Disability Will	Yes / No
Children's Trust	Yes / No	Business LPA	Yes / No
Lasting Power of Attorney	Yes / No	Executor Support	Yes / No
Living Will	Yes / No	Funeral Plans	Yes / No

I/We believe that the services deemed appropriate to my/our needs and circumstances have been explained to me/us. The services that I/we wish to take are circled 'Yes' and the services I/we wish to decline are circled 'No'.

I/We understand that the information I/we have received today has been dutifully provided with the intention of my/our best interests. I/We accept personal responsibility for any events arising due to my/our decision to decline any of the above-deemed appropriate services explained to me/us. I/We confirm that I/We have read (or had read to me/us) and understood the above instructions and acknowledge that they represent my/our intentions as to the disposal of my/our estate.

I/We hereby agree that we will not hold Adviserwill Ltd responsible or liable in any way for any events or costs arising from my/our decision to decline any of the above-deemed appropriate services explained to me/us.

I/We confirm that I am/we are the person(s) named in this document and that I am/we are over the age of 18 years and are of sound mind. The information I have provided is complete and correct and is to be used as the basis for preparing my/our Last Will and Testament. I/We understand that a draft Will is sent to me/us and that any changes needed to it, has to be made before the final Will is produced. I/We understand that Adviserwill Ltd may use this information for marketing activities as governed by the Data Protection Act and that I/we have read (or had read to me/us) and understood the Data Protection Notice.

I/We authorise Adviserwill Ltd to seek confirmation of Testamentary Capacity if required.



AdviserWill Ltd Privacy Notice

Who we are

AdviserWill Ltd are Will Writers and Estate Planners based in Weston-super-Mare. We act as Will Writers for our customers.

How we will use the information about you

Here at AdviserWill Ltd we take your privacy seriously and will use your personal information in a number of ways which will help us;

1. For fraud prevention,
2. For audit,
3. For statistical analysis,
4. Credit reference checks

We may share your information with fraud prevention agencies and obtain information about you.

We will not disclose your information to any company outside of our company except to help prevent fraud or if required by law to do so.

For further information on how your information is used, how we maintain the security of your information and your rights to access/alter and change information we hold on you, please contact compliance@adviserwill.co.uk.

Additional Marketing

However, from time to time we would like to contact you with detail of other specific products / offers / services / competitions we provide. If you consent to us contacting you for this purpose, please tick to say how you would like us to contact you.

- Post
- Email
- Phone
- Text
- Automated Call



Your Personal Data:

What we need

AdviserWill Ltd will be what is known as the 'controller' and the 'processor' of the personal data you provide to us. We collect personal data about you which may also include any special types of information or location-based information.

We also gather

Your name, address, email address, dependents, financial status.

Why we need it

We need to know your basic personal data in order to provide you with an accurate recommendation for your personal circumstances. We will not collect any personal data from you we do not need in order to provide and oversee this service to you.

For processing of data to be lawful under GDPR AdviserWill Ltd use;

(a) Consent: the individual has given clear consent for you to process their personal data for a specific purpose.

(b) Legal obligation: the processing is necessary for you to comply with the law (not including contractual obligations).

What we do with it

All the personal data we use is controlled by AdviserWill Ltd in the UK, however, for the purposes of IT hosting and maintenance, this information is located on servers within the European Union. No third parties have access to your personal data unless the law allows them to do so. We have a Data Protection regime in place to oversee the effective and secure processing of your personal data. More information on this framework can be found by emailing compliance@adviserwill.co.uk.

How long we keep it

We are required to keep your basic personal data, such as your name, address, contact details, and financial status indefinitely. The information used for marketing will be kept with us until you notify us that you no longer wish to receive this information.



What are your rights?

If at any point you believe retained information is incorrect you can request to see this information and even have it corrected and possibly deleted. Providing you with this information is free of charge, but charges may apply for excessive requests.

If you wish to raise a complaint on how we have handled your personal data, you can contact our Data Protection Officer who will investigate the matter.

Where relevant, you have the right to withdraw consent at any time and this means that we cannot process your data provided without your consent.

If you are not satisfied with our response or believe we are processing your personal data not in accordance with the law you can complain to the Information Commissioner's Office (ICO).

Our Data Protection Officer is Nick Barnes and you can contact them at compliance@adviserwill.co.uk.

If you consent to this document, please sign to confirm.

Name.....

Name.....

Signature.....

Signature.....

Date.....

Date.....