

Julie Wesson Independent Funeral Directors Ltd

Privacy and Data Retention Policy

Client Information

We collect personal data from our clients and others in the course of making funeral arrangements.

What personal data do we collect?

- Full name
- Postal Address
- Telephone number(s)
- Email address
- Relationship to the deceased.

Why do we need this data?

- To maintain contact with our clients until the funeral and all subsequent matters appertaining to the funeral have been dealt with.
- To pass on to third parties who require this information to fulfil their part of the contract we have entered into with our client.

This lawful basis for the processing of this data falls within the 'contract' category.

What else do we do with this data?

At the time of making the funeral arrangements, we request consent from our client to use their data in additional ways. These include:

- Consent to disclose their details to the charity or charities to which donations are being sent, to allow them to acknowledge to our client the donations forwarded to them.
- Consent to contact our clients regarding future events which may be relevant to them, such as memorial services which we organise.
- Consent to pass on information to other third parties who are involved in the funeral arrangements, e.g., a Stonemason or Caterers.
- Funeral Safe Finance

The lawful basis for the processing of this data falls within the 'consent' category. This data will only be used for the activities for which we have obtained consent. You have the right to contact us to vary this consent at any time.

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How long do we keep this data?

It is our practice to retain information relating to the funerals we conduct. This information is retained indefinitely in order to allow us to replicate funeral arrangements in future years upon request, or should there be a query regarding the detail of a funeral in the future. Whilst data relating to someone who has died is not subject to the protections of the General Data Protection Regulation, the information we retain includes details of our client at the time of making these arrangements, and may also include details of other family members which were given to us at the time of making these arrangements. This information is stored within our premises and in electronic form.

Any former client or individual who would like us to remove their personal data from these records can contact us at any time and we will remove their personal data from both our paper and electronic records, unless it is still required for the resolution of further matters or if it is required to allow us to fulfil any outstanding legal or procedural obligations.

Information about other individuals.

Where we collect data about individuals other than our client, we do not pass this data on to third parties without the consent of that individual. The information gathered will be retained in the same way as client information – as explained above. Any individual who would like us to remove their personal data from our records can contact us at any time and we will remove their personal data from both our paper and electronic records.

On occasion and at the wishes of our client, we also collect data from attendees at funeral services. We compile this data into a list which is given to our client, and then retained electronically for one calendar month from the date of the funeral, after which it is deleted. The lawful basis for the processing of this data falls within the 'consent' category.

Information received when handling donations.

When we receive donations in memory of someone who has died, the donor may have included their personal data, including their name, address, telephone number and email address. We use this information in the following ways:

- To provide a list of the donors to our client. This list contains the names only of those who have donated who can be identified, and does not include their address or other contact details, or the amount they have donated.
- If the donor has provided their address, we use this information to send them a receipt to confirm that we have received their donation.
- If either ourselves or the charity have a query or problem regarding their donation, we will use any contact details provided to contact the donor to try and resolve the issue. We will not pass on donors' contact details to our client or any other party.
- Your details will only be passed onto the charity if you have requested that your donation is GiftAided, in which case we will send your GiftAid request to the charity.

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Privacy and Data Retention Policy

Once the donations have been processed, we keep all information for seven years in line with HMRC guidelines, at which point it is securely destroyed.

If you are sending a donation and you do not want your personal data to be processed or retained as detailed above, please make this clear in a letter accompanying your donation, or contact us with details of your donation.

Email retention

It is our policy to retain email correspondence for six months, after which emails and their associated addresses are deleted. If you would like us to remove your email address or any email correspondence with you from our computers and servers before this time, please contact us.

Your rights

At any point whilst we hold data relating to our clients or other individuals, they have the following rights:

- The right of access to a copy of the information we hold about them.
- The right of correction – they have the right to correct any data which we hold which is inaccurate or incomplete.
- The right to prevent direct marketing – once our involvement with our client is complete, we cannot contact them in the future without their permission.
- The right to be forgotten – former clients can request that their personal data be removed from our records. We can decline to do this if there are outstanding matters which require us to make contact, or if the information is needed to fulfil legal obligations.
- The right to complain – see complaints procedure below.

How to complain about the use of your personal data

If you wish to complain about our use of your personal data, you can do so directly to us in writing to: info@juliewessonfuneraldirectors.co.uk

If you wish to complain to a governing body you may write to The National Society Of Allied And Independent Funeral Directors (SAIF):

SAIF, 3 Bullfields, Sawbridgeworth, CM21 9DB