



Privacy Policy

Effective Date: September 2025

Your Life List (“we”, “our”, “us”) is committed to protecting and respecting your privacy. This Privacy Policy explains how we collect, use, store, and protect your personal information when you use our services or visit our website.

We reserve the right to update this Privacy Notice at any time and we may also notify you in other ways from time to time about the processing of your personal information.

1. Information We Collect

We may collect and process the following types of information:

- **Personal Information** such as your name, date of birth, contact details (address, phone, email), marital status and identification documents.
- **Financial & Legal Information** such as Wills, Lasting Power of Attorney (LPA), insurance and pension details, family and estate information, and banking and billing information.
- **Technical Information** such as your IP address, browser type, device information, and website usage data.
- **Communications** such as records of correspondence with you (emails, calls, forms).

We may also collect, store and use more sensitive personal information (Special Categories of personal data/information) to the extent that you voluntarily share it with us, such as information about your race or ethnicity, religious beliefs, sexual orientation, political opinions, and your health, including any medical condition, health and sickness records.

We collect personal information about you in connection with our products and services in the following ways:

- information which you provide directly to us;
- information collected automatically through our website;
- information collected from the public domain or from by third parties such as Companies House.

2. How We Use Your Information

We use your information to:

- Provide and deliver our services.
- Prepare documents such as wills, LPAs, and Life Lists.
- Manage subscriptions, billing, and payments.
- Communicate with you (updates, reminders, customer support).



- Comply with legal and regulatory obligations.
- Improve our website and services.

3. Lawful Basis for Processing

We process personal data under the following lawful bases (UK GDPR):

- **Contractual necessity** – to provide services you request.
- **Legal obligation** – to meet regulatory requirements.
- **Legitimate interests** – for example to improve our services and communicate with you, where our legitimate interests are not overridden by your interests, rights and freedoms.
- **Consent** – for marketing communications or optional services. You can withdraw consent or opt out of marketing communications at any time by contacting us.

4. Sharing of Information

We may share your personal information in limited circumstances with:

- Professional advisers (e.g., solicitors, financial or tax specialists) if requested or required by you in connection with our services.
- Government bodies for official applications.
- Service providers and our own professional advisers who support our operations (e.g., IT, secure storage, payment processing) and are subject to agreements with us which safeguard the protection of your personal information.

Where you instruct us to share your personal data with third parties instructed by you, including solicitors, financial advisers, or other professional service providers, we will do so on your behalf. We are not responsible for how those third parties process your data and you should review their privacy notices before engaging their services. We are also not responsible for the services, fees, or advice of any such third parties – any engagement with them is at your discretion and subject to the agreement or terms of business in place between you and the relevant third party.

5. Storage, Retention & Destruction

- We store documents securely in digital and/or physical form.
- If you subscribe to ongoing services, information will be held for the duration of your subscription.
- If your subscription ends, you may request return of your documents, or we will securely destroy them after a set period.
- We are not responsible for retaining information beyond the agreed service period.

6. Delivery of Documents

- Digital copies will be provided securely in PDF format.

- Printed and bound Life List Packs will be delivered by post or courier.
- We aim to deliver digital documents within 14 working days and printed packs within 14 working days of completion.
- We are not liable for delays caused by postal or courier services.

7. Data Security

We use technical and organisational measures to protect your personal data and mitigate the risk of unlawful or unauthorised access, destruction, loss, alteration, disclosure, or use of your personal information, including encryption, access controls, and secure storage facilities.

8. Cookies & Website Tracking

What are Cookies?

Cookies are small text files stored on your device to help the website function properly, analyse usage, and improve your experience.

Types of Cookies We Use

- **Essential Cookies** – required for the website to function.
- **Analytics Cookies** – collect anonymous data on website usage.
- **Functional Cookies** – remember preferences.
- **Marketing Cookies** (if applicable) – track browsing habits for relevant advertising.

Managing Cookies

On first visit, you will see a cookie consent banner allowing you to accept or manage preferences.

You can also block or delete cookies via browser settings, but blocking essential cookies may affect functionality.

9. Your Rights

Under UK GDPR, you have the right to:

- Access the personal data we hold about you.
- Request correction of inaccurate information.
- Request deletion of your data (“right to be forgotten”).
- Restrict or object to processing in certain circumstances.
- Request transfer of your data to another provider (“data portability”).
- Withdraw consent (where consent is the lawful basis).

To exercise these rights, contact us at: info@yourlifelist.co.uk.

10. Complaints Handling

If you have any questions or concerns about how your data is handled, please contact us:

- **Email:** info@yourlifelist.co.uk
- **Post:** 124 City Road, London EC1V 2NX
- **Phone:** 0204 604 3606

We will acknowledge your complaint within **5 working days** and aim to provide a full response within **20 working days**. If you remain dissatisfied, you may escalate your complaint to the UK Information Commissioner's Office (ICO) at <https://ico.org.uk>.

11. International Transfers

Where data is transferred outside the UK/EEA, we ensure appropriate safeguards (such as UK-approved Standard Contractual Clauses) are in place.

12. Children's Privacy

Our services are not intended for or directed to individuals under 18. For clients aged 18–25, consent must be given by the individual, and in some cases may require guardian involvement.

13. Changes to this Policy

We may update this Privacy Policy from time to time. Updates will be published on our website with the "Effective Date" amended.

14. Contact Us

For questions about this Privacy Policy or how your data is handled, please contact:

Your Life List
124 City Road, London EC1V 2NX
info@yourlifelist.co.uk
0204 604 3606