



# *William Wallace & Son*

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## Privacy Policy

March 2018

### **Statement of Policy and Purpose of Policy**

1. William Wallace & Son Funeral Directors is committed to ensuring that all personal information or data handled and held by us is processed in accordance to legally compliant standards of data protection and data security in line with the requirements of the General Data Protection Regulation.
2. The purpose of this Policy is to help us achieve our data protection and data security aims by:
  - a) Notifying our staff, clients and other relevant individuals of the types of personal information that we may hold about them and what we will do with that information.
  - b) Ensuring all staff members understand and follow our rules and legal standards for handling personal information and any other data they have access to.
  - c) Clarifying the responsibilities and duties of staff in respect of data protection and security.

### **Who is responsible for data protection and data security?**

3. Maintaining appropriate standards of data protection and data security is a collective task with all members of staff responsible for ensuring compliance. All information, including personal data, must be handled consistently with the principles set out here and ensure that measures are taken to protect the data security. Miss Carly McKnight, the data controller, has responsibility for leading by example and monitoring and enforcing compliance. Any breach of the conditions outlined in this policy will be taken seriously and may result in disciplinary action.
4. All employees who interact with data subjects are responsible for ensuring that this notice is drawn to the data subject's attention and their consent to the processing of their data is explicitly secured.

### **What personal information is covered by this policy?**

5. This policy covers personal information:
  - a) Which relates to a living individual who can be identified either from that information in isolation or by reading it together with other information we possess;
  - b) That is stored electronically or on paper in a filing system by us;
  - c) Which relates to staff or to any other individual whose personal information we handle or control;
  - d) Which we obtain, hold or store, organise, disclose, amend, use, handle, process or destroy.

### **What personal information do we process and what do we do with it?**

6. We collect personal information about you which:
  - a) You provide and we gather during the process of making funeral arrangements or during enquiries for other services we provide.
  - b) Is provided by third parties, such as local authorities (e.g. the name of a lair holder).
7. The types of information that we collect, store and use, with your consent, include:
  - a) Full name, address, telephone number and email address.
  - b) Sensitive information – Religious/Other Beliefs and Financial Details
8. We will use this information to carry out our business, to arrange and book a funeral service on your behalf or to arrange the erection of a memorial or for the arrangement or administration of a Golden Charter Funeral Plan.
  - a) Application Forms – personal information (name, address, contact number, occupation and marital status) pertaining to the Next of Kin/Applicant/Funeral Arranger is required for application forms for Local Authorities and Crematoria. These are forwarded to the relevant organisation and are not held by the firm.
  - b) Arrangement Forms – used when making arrangements for a funeral, the Arrangement Form contains information pertaining to the deceased as well as contact information for the Next of Kin/Funeral Arranger. Arrangement Forms are held securely by the firm for future reference and future correspondence with the next of kin, where appropriate and where consent has been given.

- c) With your consent your contact details will be passed to a nominated celebrant or member of the clergy for the purpose of arranging a meeting to discuss the content of the funeral service.
  - d) The venue chosen to host the funeral service may require the name and contact number of the chief mourner.
  - e) Bank account or credit/debit card details are sometimes required when purchasing a funeral plan, these are not held by the firm in any circumstance, they are forwarded to Golden Charter for plan administration.
9. We can confirm that William Wallace & Son is a data controller for the personal information held, the purposes for which, and the manner in which the information is processed under GDPR. For pre-paid funeral plans Golden Charter is the data controller, William Wallace & Son is the data processor.
10. If you believe that any information we are holding about you is incorrect or incomplete, please telephone, write or email us as soon as possible and we will promptly correct any information found to be incorrect.
11. We will take steps to ensure that your personal information is kept secure, we will never disclose your personal information to any third parties for marketing or any other purposes. Exceptions to this are:
- a) Where necessary to render services from other parties which provide products or services to us, for example to arrange: a funeral; the erection of a memorial; a funeral plan.
  - b) To comply with our legal obligation to assist in criminal investigation or to seek legal or professional advice.

### **Data Protection Principles**

12. Under the General Data Protection Regulations, personal information must be:
- a) Processed fairly and lawfully and in a transparent manner – the subject must be made aware of who controls the information (The Firm) and the purpose(s) for which we process it and to whom it may be disclosed.
  - b) Processed for limited purposes and in an appropriate way, data must be used only for the purpose it was collected for.
  - c) Adequate, relevant and not excessive for the purpose.
  - d) Accurate – regular checks must be made to amend or destroy inaccurate information.
  - e) Not kept for longer than is necessary.
  - f) Processed in line with the subject's rights (detailed below).
  - g) Subjects have the right to data portability.
  - h) Secure.
  - i) Not transferred to people or organisations without adequate protection.

### **Data Security**

13. We must protect all personal information in our possession from being accessed, lost, deleted or damaged unlawfully. We do this by ensuring that:
- a) Only people who are authorised to use the information can access it;
  - b) Information is accurate and suitable for the purpose for which it is processed.
14. Security procedures include:
- a) Physically securing information - Information on hard copy is stored in a securely locked location. Information stored electronically is held securely and can only be accessed by authorised personnel using a password. Our computers are locked when not in use.
  - b) Telephone precautions – All staff members are aware they must never disclose information over the telephone.

### **Your Rights as a Data Subject**

15. At any point while we are in possession of or processing your personal data, you, the data subject, have the following rights:
- a) Right of access – you have the right to request a copy of the information that we hold about you, this should be done in writing and a fee may be payable. This request must be fulfilled within one month.
  - b) Right of rectification – you have the right to correct data that we hold about you that may be inaccurate or incomplete.
  - c) Right to be forgotten – you may request that we erase any data held about you from our records.
  - d) Right to restriction of processing – where certain conditions apply to have a right to restrict the processing.
  - e) Right of portability – you have the right to have the data we hold about you transferred to another organisation.
  - f) Right to object – you have the right to object to certain types of processing, i.e. direct marketing.
  - g) Right to object to automated processing, including profiling – you also have the right to be subject to the legal effects of automated processing or profiling.
  - h) Right to judicial review: in the event that William Wallace & Son refuses your request under rights of access, we will provide you with a reason as to why. You have a right to complain, as outlined below.

### **Complaints**

16. In the event you wish to make a complaint about how your data is being processed you should contact Wm. Wallace & Son (details overleaf) or if you are dissatisfied with how your complaint has been handled you have a right to lodge a complaint with the supervisory authority, The Information Commissioners Office by telephone: 0303 123 1113 or by email: <https://ico.org.uk/global/contact-us/email/>