Privacy Notice

1st Step Wills & Trusts Limited

Last updated: 13 July 2026

Purpose of this notice

This notice explains how we collect, use, share, retain and protect personal information, and the rights available to individuals under UK data protection law.

Prepared for publication on the 1st Step Wills & Trusts website. The website administrator should ensure the live cookie list and third-party service details remain current.

1. Who we are

1st Step Wills & Trusts Limited is committed to protecting personal information and respecting privacy. For the purposes of UK data protection law, 1st Step Wills & Trusts Limited is the data controller.

Company	1st Step Wills & Trusts Limited
Company number	11910658
ICO registration	ZA559012
Registered office	International House, 66 Lavender Hill, London, SW11 5RQ, United Kingdom
Correspondence address	Unit 7, Olympic Park, Olympic Way, Warrington, WA2 0YL, United Kingdom

Email: support@1ststepwills.co.uk

Telephone: 0203 762 2252

This notice applies to clients, prospective clients, website users, beneficiaries, executors, trustees, attorneys, guardians, family members, professional contacts, introducers and other people whose personal information we process in connection with our estate-planning and related services.

2. Personal information we collect

Depending on the service or enquiry, we may collect and process:

- identity and contact details, including names, titles, dates of birth, addresses, email addresses and telephone numbers;
- family, relationship and household information, including details of spouses, partners, children and dependants;
- occupation, employment and business information;
- identity-verification documents and information used for fraud-prevention or compliance checks;
- financial information, including assets, liabilities, property, pensions, investments, insurance, business interests and intended gifts;
- information about Wills, trusts, powers of attorney, probate, succession planning and document storage;
- details of beneficiaries, executors, trustees, attorneys, replacement attorneys, guardians, witnesses and certificate providers;
- payment, invoice, transaction and refund information;
- instructions, questionnaires, draft documents, signed documents, correspondence, meeting notes and telephone records;
- complaint, dispute, regulatory and legal-claim information;
- website and technical information, such as IP address, browser, device type, pages viewed, referral source and cookie preferences.

3. Special-category and sensitive information

Estate-planning instructions may require us to process sensitive information. This can include health or medical information, mental-capacity information, racial or ethnic origin, religious or philosophical beliefs, sexual orientation, and information about personal relationships.

We only process this information where it is relevant and necessary, and where an additional lawful condition applies, such as explicit consent, the establishment, exercise or defence of legal claims, or another condition permitted by the Data Protection Act 2018.

4. Information about other people

Clients often provide information about other people, including beneficiaries, executors, trustees, attorneys, guardians, family members and professional advisers. Please ensure, so far as reasonably possible, that the information is accurate and that you are entitled to provide it.

We may not contact those people immediately where doing so would reveal confidential instructions, undermine the purpose of the estate-planning arrangement, or be otherwise inappropriate.

5. How we obtain personal information

- directly from the individual, including through telephone calls, emails, forms, questionnaires, meetings and video appointments;
- from a spouse, partner, family member, joint client, attorney, executor, trustee or authorised representative;
- from an introducer, financial adviser, mortgage adviser, accountant, solicitor or other professional referral source;
- from public records and official sources, including Companies House, HM Land Registry, courts and government bodies;
- from providers supporting document production, storage, registration, delivery, payment or administration;
- automatically when a person uses our website, subject to their cookie choices.

6. How we use personal information

- responding to enquiries and providing information or quotations;
- taking instructions, advising on options and assessing estate-planning requirements;
- preparing, checking, amending and finalising Wills, trusts, powers of attorney and related documents;
- arranging printing, binding, signing, delivery, registration, storage and retrieval of documents;
- verifying identity, preventing fraud and maintaining security;
- administering payments, invoices, refunds, accounts and financial records;
- communicating about drafts, appointments, instructions, signing requirements, reviews and service updates;
- referring work to solicitors, probate practitioners or other professionals where agreed or necessary;
- managing complaints, disputes, insurance matters and legal claims;
- complying with legal, regulatory, tax, accounting and law-enforcement obligations;
- improving our services, staff training, quality control, website operation and information security;
- sending marketing communications where the law permits.

7. Lawful bases for processing

Contract

We process personal information where necessary to take steps at a person's request before entering into a contract, or to perform a contract for estate-planning or related services.

Legal obligation

We process information where necessary to comply with legal or regulatory duties, including accounting, taxation, data protection, fraud-prevention, court orders and lawful requests from public authorities.

Legitimate interests

We may process information where necessary for our legitimate interests or those of another person, provided those interests are not overridden by the individual's rights. Relevant interests include administering our business, maintaining accurate professional records, protecting legal rights, preventing fraud, managing complaints, ensuring security and improving services.

Consent

We may rely on consent for particular disclosures, marketing communications, non-essential cookies, call recording where applicable, and some processing of special-category information. Consent may be withdrawn at any time, without affecting processing that was lawful before withdrawal.

Legal claims and other special-category conditions

Where special-category information is processed, we also identify an appropriate condition under the Data Protection Act 2018, such as explicit consent or processing necessary for the establishment, exercise or defence of legal claims.

8. Call recordings and meeting notes

We may record telephone or video calls where callers have been informed that recording may take place. We may also make written attendance notes. These records may be used to confirm instructions, monitor quality, train staff, investigate complaints, protect clients and the company, and establish or defend legal claims.

Recordings and notes are retained only for as long as reasonably necessary under our retention arrangements.

9. Sharing personal information

Where necessary and lawful, we may share information with:

- our employees, consultants, authorised representatives and professional advisers;
- secure IT, cloud-hosting, email, communications, customer-management and software providers;
- document-drafting, printing, binding, delivery, registration, secure-storage and retrieval providers;
- payment processors, banks, insurers, accountants and auditors;
- solicitors, barristers, probate practitioners, tax advisers and other specialists;
- introducers and referral partners where authorised and appropriate;
- HM Land Registry, the Office of the Public Guardian, HM Courts and Tribunals Service, HM Revenue & Customs and other public bodies;
- Cancer Research UK or another charity where a client chooses to participate in a relevant scheme or leave a charitable legacy;
- courts, regulators, law-enforcement bodies, safeguarding authorities and fraud-prevention organisations;
- a buyer, investor or adviser in connection with a proposed sale, merger or restructuring of the business.

Service providers acting on our behalf are expected to use information only for the agreed purpose, keep it secure and comply with applicable data-protection requirements.

10. International transfers

Some service providers may process or store personal information outside the United Kingdom. Where this occurs, we use an appropriate legal transfer mechanism, such as UK adequacy regulations, the UK International Data Transfer Agreement, the UK Addendum to approved standard contractual clauses, or another safeguard permitted by law.

Further information about the safeguards used for a particular transfer is available on request.

11. Data security

We use appropriate technical and organisational measures designed to protect personal information against accidental or unlawful destruction, loss, alteration, unauthorised disclosure or access.

- access controls and staff confidentiality requirements;
- secure systems, passwords, encryption and backups where appropriate;

- careful selection and contractual oversight of service providers;
- procedures for handling incidents, requests and complaints;
- regular review of information-security risks.

No method of internet transmission or electronic storage is completely secure. Individuals should take reasonable care when sending sensitive information electronically.

12. How long we retain information

We keep personal information only for as long as reasonably necessary for the purpose for which it was collected, taking account of the nature of the service, legal and regulatory obligations, limitation periods, insurance requirements, the continuing relevance of estate-planning documents and the possibility of complaints or claims.

Record type	Indicative retention approach
Enquiries that do not proceed	Normally up to 6 years where needed for administration, complaint handling or legal claims, subject to review.
Client files and instructions	Normally at least 6 years after completion or termination, and longer where the nature of the document or potential claim justifies it.
Executed Wills and related records	Potentially throughout the client's lifetime and for an appropriate period after death, where needed to support the validity, interpretation, storage or retrieval of the Will.
Trust and estate-planning records	For as long as the arrangement remains relevant, and afterwards where required for administration, compliance or legal claims.
Financial and accounting records	Normally at least 6 years, subject to applicable tax and accounting requirements.
Call recordings	For a proportionate period based on the purpose of the recording, complaint and claim risk, and operational need.
Marketing records	Until consent is withdrawn, an objection is made, or the information is no longer needed. Limited suppression records may be retained to respect opt-outs.

Retention periods are reviewed. Information that is no longer required is deleted, anonymised or securely destroyed. Data-protection law does not prescribe one universal retention period; the period must be justified by the purpose.

13. Marketing communications

We may send marketing communications where a person has consented or where the law otherwise permits us to contact an existing client about similar relevant services.

Marketing preferences can be changed at any time by using an unsubscribe facility or contacting support@1ststepwills.co.uk. We may retain limited suppression information to ensure that an opt-out is respected.

14. Cookies and similar technologies

Our website may use cookies and similar storage or access technologies. Strictly necessary technologies may be used where required to provide the website or a service requested by the user.

Analytics, functionality, personalisation and advertising technologies are used only in accordance with applicable law and the user's choices. Where consent is required, non-essential technologies will not be activated unless the user has made an appropriate choice.

The website should provide a current cookie-preference tool and a separate Cookie Policy identifying the provider, purpose and lifespan of each technology. Continuing to browse the website is not, by itself, treated as consent to non-essential cookies.

15. Individual rights

Depending on the circumstances, individuals may have the right to:

- be informed about how their personal information is used;
- request access to personal information;
- request correction of inaccurate or incomplete information;
- request erasure of information;
- request restriction of processing;
- object to processing based on legitimate interests;
- object at any time to direct marketing;
- receive certain information in a structured, commonly used and machine-readable format and transmit it to another controller;
- withdraw consent;
- receive safeguards in relation to solely automated decisions producing legal or similarly significant effects;
- complain to the Information Commissioner's Office.

These rights are not absolute. A request may be refused or limited where permitted by law, including where information must be retained to comply with a legal obligation or for the establishment, exercise or defence of legal claims.

We normally respond to valid rights requests within one month. The period may be extended where permitted for a complex request, in which case the individual will be informed.

16. Automated decision-making

We do not currently make decisions producing legal or similarly significant effects about clients solely by automated means. Technology may assist with generating draft documents from supplied information, but appropriate human review remains part of the service.

17. Complaints

Please contact us first if you have a concern about how we use personal information. We will consider the matter and respond in accordance with our legal obligations.

Email: support@1ststepwills.co.uk

Telephone: 0203 762 2252

Correspondence address: Unit 7, Olympic Park, Olympic Way, Warrington, WA2 0YL, United Kingdom

Individuals also have the right to complain to the Information Commissioner's Office (ICO): Wycliffe House, Water Lane, Wilmslow, Cheshire, SK9 5AF; telephone 0303 123 1113.

18. Links to other websites

Our website may link to websites operated by other organisations. Those organisations are responsible for their own privacy practices. Please review their privacy information before providing personal information. We are not responsible for the content, security or privacy practices of external websites.

19. Changes to this notice

We may update this notice to reflect changes in the law, regulatory guidance, our services, technology or service providers. The current version will be published on our website with the date of the latest update. Where a change materially affects how existing information is used, we will take reasonable steps to notify affected individuals.

20. Contact us

Questions, requests and complaints concerning this notice or personal information should be sent to:

Data controller	1st Step Wills & Trusts Limited
Email	support@1ststepwills.co.uk
Telephone	0203 762 2252
Correspondence address	Unit 7, Olympic Park, Olympic Way, Warrington, WA2 0YL, United Kingdom
Registered office	International House, 66 Lavender Hill, London, SW11 5RQ, United Kingdom
ICO registration	ZA559012

Publication and implementation note

For the website administrator

Before publication, confirm that the Cookie Policy and consent banner accurately identify every cookie, analytics, advertising, chat, embedded-media and tracking service actually operating on the live website. The privacy notice should also be reviewed whenever material service providers or processing activities change.

Official guidance consulted

Information Commissioner's Office: Right to be informed; What privacy information should we provide?; Storage limitation; Cookies and similar technologies. Accessed July 2026.

This document is a practical privacy-notice draft and should be reviewed alongside the company's actual data flows, contracts, retention schedule and website configuration. It is not a substitute for bespoke legal advice.