



SLS WILLS AND MORE LIMITED

TERMS OF BUSINESS

These terms and conditions, along with the client care letter to which these terms are attached, constitute the basis upon which SLS Wills and More Ltd will provide you with legal services.

1. **SLS Wills and More Ltd** is a private limited company registered at Companies House (number 12384538). Our office is Office 4 Garrity House, Miners Way, Aylesham, Canterbury, CT3 3HB. Our telephone number is 01304 577998.

SLS Wills and More Ltd also trades as SLS Wills and More. Accordingly, all references in these Terms of Business and in any other documents or correspondence you receive from us to “SLS Wills and More”, “the company”, “we”, “us”, or “our” should be read as referring to SLS Wills and More Ltd. Nothing in any such documents or correspondence should be taken to indicate that SLS Wills and More is an unlimited liability entity.

2. **Our Terms and Conditions of Business**

SLS Wills and More aims to provide a high-quality service in every respect, and we will make sure that the matters we handle for you proceed as smoothly and as well as possible.

Our Terms of Business govern the services to be provided to you by the company and/or its members, associates, employees, and consultants from time to time (SLS Wills and More Personnel), except to the extent that we inform you in writing that different terms apply.

Our Terms of Business are subject to review from time to time and you will be informed in writing of any material changes. If any provision in any engagement letter you receive from us or a specific matter conflict with our Terms of Business, the provision in the engagement letter will apply. The engagement letter, our Terms of Business, and any additional express terms constitute the entire agreement and understanding between us.

Our agreement will apply to any future instructions you give to the firm and your new and continuing instructions will amount to your acceptance of these terms.

3. **Our relationship with you**

3.1 Our Client(s)

References in this document to “you” mean our instructing client(s) in any particular matter. Our duties are owed only to our client on any matter on which you instruct us. These terms also apply to any of your holding, subsidiary, or associated companies for whom we may act, whether or not we receive those instructions directly or via you.

We do not accept obligations to any other person or company, unless we expressly agree to do so in writing. In those circumstances, these terms will also apply to our work for that person or company.

Please note that we cannot accept any instructions from any third party on your behalf, however, a third party is able to make an appointment on your behalf if this is a suitable method of communicating with you.

3.2 The people responsible for your matter

The person responsible for handling your matter is named in the client engagement letter that you received with these Terms of Business, as is their file supervisor. The Senior Director is supported by support staff, but all other personnel may not have any support staff to assist them. We will try to avoid changing the members of your team, but, where this cannot be avoided we will explain any changes to you promptly.

3.3 The Company undertakes to:

- a. Comply with your instructions with reasonable skill, care and expedition appropriate to your needs.
- b. Provide you with the best advice on matters relating to the Will Writing Services. In some cases, this may mean advice to draw up other documents, or take other action, which may incur further fees. In such cases full details of such charges will be given to you in advance and you are under no obligation to proceed with any ancillary services offered. However, in some circumstances you may be asked to sign a declaration stating that you are acting against the advice given.
- c. Comply with the Client's instructions using all due skill, care and expedition appropriate to the need of the client. Regarding the dispatch of documents Company must adhere to the following timescales unless otherwise agreed in writing with the client at the time that the client's instructions are received. The following timescales take effect immediately upon the Client providing all the information required to complete the agreed instructions:
 - i. Dispatch of Draft documents – 7-10 working days
 - ii. Dispatch of executable documents AFTER drafts are approved – as agreed with you when appointment for signing is booked (subject to operational requirements)
- d. However where circumstances occur, including those which are beyond the Company's control, which result in the documents being delivered outside the above stated timescales, the client must be informed and upon their request must be provided with a full written explanation for the cause of the delays AND the opportunity to renegotiate or cancel the contract, with a full refund being provided should it be requested by the client.
- e. Maintain the strictest confidentiality and not to pass on your details to any other organisation without your express written permission unless legally required to do so and shall comply with all legislation in force relating to data protection.
- f. Offer an attestation service that supervises the signing and witnessing of your Documents at your home. The Company will not take responsibility for ensuring the validity of your Documents where the attestation service has not been taken up and the execution supervised by an agent of the Company. The signing of your Documents must be carried out according to the law of England and Wales in order for your Documents to be valid. All Documents will be supplied to you with full written instructions of how these should be completed, and the Company will check the documents for free after they have been signed to ensure validity. It is your responsibility to send the documents to our Company after you have signed them if you would like them checked.
- g. Refund any money paid in respect of the preparation of your Will(s) should you change your mind within 14 days from the date of taking your instructions. After the expiration of this period the Company reserves the right to charge you for the advice given and for any work already carried out on your behalf and in accordance with your signed instructions. An itemised bill will be produced for any charge falling due under this term.*
- h. The Company does not accept any liability or obligation to advise you of any changes in legislation or taxation which may affect you either directly or indirectly and may necessitate a review of your Documents. Any Will should be reviewed every three years and on the occasion of any material change in your circumstances, such as divorce, marriage, the birth of children or the inheritance of a large sum of money etc.
- i. Where the company cannot legally or practically follow the instructions given by the client, the company must explain any differences between the client's instructions or expectations and the documents to be provided.

3.4 What we expect from you

- you will provide us with clear, timely, comprehensive, and accurate instructions.
- you will provide us with all relevant documentation in a timely matter.
- you will let us know promptly of any changes to your name, address or other contact details and any changes to your circumstances or standing.
- you will supply us with your bank details on request so that we can send any monies owing to you, and you will advise us of any subsequent changes.
- you will pay our fees upon request or within 7 days.

4. Conflict of Interest

We search our records to protect you from conflicts of interest. Where a conflict arises or may arise (for example where we find that a third party involved in the matter for which you instruct us has been a client), we may not be able to accept your instructions or continue working on the matter.

We may act for two or more persons in a particular matter if there is no conflict between you. However, if a conflict arises during our retainer then we may be obliged to cease acting for one or more of you.

You accept that the nature of our business invariably means that we may well be representing other clients who operate in your industry and may be in competition with you or they may be other members of your family. We will not under any circumstances pass on to you any confidential information which we may receive from another client which may be of commercial or other interest to you. We will of course observe similar confidentiality concerning any confidential information we receive from you.

In the event of a conflict, we will speak to both parties and obtain agreement as to whether or not we can act for you and if no agreement is forthcoming, both parties will need to find alternative representation.

5. Concerns and Complaints

The Company is committed to providing the Customer with a high-quality service. An essential part of that service is that the Company will communicate effectively with the Customer so that they are kept informed of progress.

If raising a Complaint:

- The Company maintains a full complaints procedure, a copy of which is enclosed in Appendix 1, to which any complaint should first of all be addressed.
- If the matter is unable to be resolved to your satisfaction you may refer it, in writing, to the Complaints Department, The Society of Will Writers, Chancery House, Whisby Way Lincoln, LN6 3LQ.

The Company complies with the Society's Code of Practice of which a copy is available upon request.

A customer satisfaction survey is available from your consultant upon request. The survey is also available online at <https://www.willwriters.com/public/making-a-complaint/>

6. Costs, VAT, and expenses

6.1 Fixed fees

For Wills and Lasting Powers of Attorney, we charge Fixed Fees. This will be the fee that you are charged, subject to the addition of VAT and disbursements as above. However, there are circumstances in which we may seek to vary the fee we charge you. Such factors might include the complexity of the issues, the speed at which action must be taken, the expertise or specialist knowledge that the matter requires, and if appropriate, the value of the property or subject knowledge involved.

In some circumstances, we will ask for the agreed fixed fee to be paid upon your instruction to act on your behalf.

Based on the information currently available, we expect these factors to be adequately covered by

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the fee agreed. We hope it will not be necessary to increase our fees, but in any event, we will not increase the fees without informing you.

6.2 Hourly Rates

Most of our fees are on a Fixed Fee basis (see above) and are detailed on our Price List. In certain circumstances it may be necessary to work on an hourly charge-out rates. If this is the case, our charge-out rates are as follows:

- Senior Estate Planning Consultant - £200 plus VAT (£240 per hour)
- Trainee Will-Writers - £120 plus VAT (£144 per hour)
- Administration staff - usually not chargeable but can be £50 plus VAT (£60 per hour) in exceptional circumstances

Our rates may be varied from time to time, and subject to notification, are subject to uplift on an annual basis. Details of applicable rates will be notified to you upon request. We will invoice you either monthly or at the end of the matter at our discretion or as agreed between us in writing.

Our fees will be payable within 7 days of being raised and delivered to you.

Should a third party agree to pay our fees but fail to do so, you will nevertheless be responsible for discharging them. If you request the company to act for any company or partnership in which you have or obtain a significant interest and that entity fails to pay our invoices in full by the due date, you agree to be responsible for the unpaid amount in accordance with these terms.

6.3 VAT

VAT is charged with our services as of the 1st of February 2024. This can be found on our price list. If you require a VAT invoice please let us know. Our VAT registration number is GB459869122.

6.4 Expenses

Expenses, also known as disbursements, do not form part of our remuneration but are necessary that we make to others on your behalf. Depending on the type of work these might include property searches, Court fees, Land Registry fees, Counsel's fees, AML searches, expert reports etc. We may also charge you if original documents are sent by Signed For post at the rates charged to us by Royal Mail as shall from time to time be applicable. Some of these fees include VAT.

6.5 Estimates

Where we have not agreed to a fixed fee in advance of starting work in your matter, we will provide you with an estimate of the likely fees and disbursements. Our estimates can only be a guide and are not a cap; unforeseen problems are often encountered, and a transaction or matter may change with the result that the estimate will vary. Any departure from the estimate will be discussed with you as soon as possible.

If you are not satisfied with the amounts charged to you in an invoice you should contact the person responsible for the matter or their supervisor immediately. If you are still dissatisfied, you can invoke our complaints handling system described in **Appendix 1** of this document.

6.6 Contentious work

We do not undertake contentious work but will refer you to a preferred partner who will advise you of their fees directly under their Terms of Business.

6.7 Interest

We reserve the right to charge interest on late-paid invoices in accordance with the Late Payment of Commercial (debts) Act 1998. We also reserve the right to suspend our services or to cease to act for you having given prior written notice if payment of any fees and expenses is not made within 14 days. We intend to exercise these rights only if it is fair and reasonable to do so and strictly at our discretion.

The rate of interest will be 8% above the Bank of England base rate and will apply from the expiry of 14 days from the date of invoice until the invoice is paid in full.

If an invoice remains unpaid:

- Automatic invoice reminders will be sent at regular intervals until the invoice is paid or until a payment schedule is agreed;
- No administration fees or interest will be added where a payment schedule is agreed;
- Where an invoice remains unpaid or without a payment schedule in place within 60 days of the invoice date, SLS Wills and More Limited will consider alternative methods of recovery and the costs of recovery will be added to the invoice and payable by the Customer.

7. Your money

7.1 Payments on account/interim bills

We may ask you from time to time to make payments on account of fees and expenses as they fall due. We may also render interim invoices for the work carried out to date should your matter become protracted or to spread the cost more evenly.

Interim invoices are payable upon delivery.

You agree that you will make such payments when requested to do so by us and that your refusal or failure to make such payments will allow us to terminate the retainer upon giving you reasonable notice.

7.2 Making payment

We accept payment by bank transfer or cheque, and we will accept cash up to a maximum of £250. We use an App on our mobile phone provided through Payments Matter (a third-party provider) when present with you. We can also take payment over the phone using a web-based version of the same app. We do not store your card details under any circumstance.

7.3 Interest

We do not have a client account and all payments to us are held in a general office account with NatWest. No interest is payable to clients on any monies held. Where Executors instruct us to assist with the administration of an Estate, Executors are asked to open their own executor account with a bank of their choice, and it is then up to them to ask if interest is payable on any monies held.

8. Notice of the Right to Cancel

- 8.1 The Customer has the right to cancel the Contract within the Cancellation Period as determined by The Consumer Contracts (Information, Cancellation and Additional Charges) Regulations 2013.
- 8.2 The Seller is SLS Wills and More Ltd
- 8.3 For the purposes of this Cancellation Notice, the Reference Number to be quoted in all communications is: As detailed on the Customers invoice/receipt.
- 8.4 The Customer has the right to cancel the Contract either within 14 Calendar Days of receipt of this notice or within 14 Calendar days of signing our Terms of Business (the "Cancellation Period").
- 8.5 The Customer may be required to pay for Services provided if provision of the Services has commenced with the Customer's written agreement prior to the end of the Cancellation Period.
- 8.6 In the event that the Customer chooses to exercise their right to cancel within the Cancellation Period, the Cancellation Form attached to these Terms and Conditions as Appendix 3 should be completed in full and returned to the Seller at the address provided in sub-Clause 8.7 below.
- 8.7 Cancellation Notices must be sent to the Seller at one of the following addresses:
 - 8.7.1 A Cancellation Notice sent by post or delivered by hand must be sent to: Office 4 Garrity House, Miners Way, Aylesham, Canterbury CT3 3BF; or

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8.7.2 A Cancellation Notice sent by email must be sent to: admin@sllswillsandmore.co.uk

8.8 Cancellation Notices shall be deemed served upon the Seller:

8.8.1 In the case of a Cancellation Notice sent by post, at the time of posting; and

8.8.2 In the case of a Cancellation Notice sent electronically, on the day it is sent.

8.9 Use of the Cancellation Form is optional; however, all Cancellation Notices, in whatever format, must be in writing and must contain all information included in Appendix 1.

9. Refunds

If it is necessary to make a refund to you we prefer to do so by bank transfer, although we can send a cheque if preferred. Any refund will be paid within 24-48 hours of receiving your account details unless agreed otherwise. Your Account details must be given verbally to us or via a secure method (by email is not secure) and we will always telephone you to confirm those details. Your account details are never retained by us.

- a. If the Customer chooses to exercise the Right to Cancel in accordance with Clause 4 above, the provisions of this Clause 5 shall apply in determining any refund to which the Customer may be entitled.
- b. The Customer must inform the Seller of their exercise of the Right to Cancel within the period required by Clause 4.
- c. If the provision of Services has commenced, at the Customer's written request, prior to the giving of notice by the Customer and the end of the Cancellation Period, the Seller shall remain entitled to any monies constituting the value of such Services.
 - i. Where the Customer has already made payment to the Seller, any refund issued shall be less the relevant sum determined under sub-Clause 5.3.
 - ii. Where the Customer is yet to make payment to the Seller, the sum due from the Customer shall be adjusted accordingly.
 - iii. The Seller will inform the Customer in writing of the relevant calculations involved in determining sums deductible or payable under this Clause 7.
- d. If the provision of Services has commenced prior to the giving of notice by the Customer and the end of the Cancellation Period without the Customer's written request, the Seller shall not be entitled to any monies constituting the value of such Services.
- e. If the Customer requires their Documents urgently and require that the Company commence work prior to the expiration of the cancellation period the Customer can agree to waive their rights under the Regulations by signing a waiver agreement. This will mean that they will be required to pay for any work completed should they decide to reinstate their right to cancel within the 14 days. This should be provided in writing.

10. Money Laundering

The law requires us to obtain satisfactory evidence of the identity of our clients and sometimes people related to them. This is because we deal with money and property on behalf of our clients, and these can be used by criminals attempting to launder money.

To comply with the law, we need to get evidence of your identity as soon as possible. Our practice is to require our clients and anyone paying money to us on their behalf to provide photographic identification (e.g., a current passport or photocard driving licence) and evidence of their residential address (e.g., a utility bill or other official document addressed to you at home, not more than 3 months old). As a matter of best practice, we also conduct anti-money laundering searches against all our clients using an electronic search provider (CreditSafe).

Where no photographic identification documents are available we will require additional documentation to prove your identity – a letter from the DWP or HMRC which includes your National

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Insurance Number (dated within the last 12 months) and a second document proving your address (as described above).

Our policy, as set out above, is not to accept more than £250 in cash. If you try to avoid this policy by depositing cash directly into our bank, we may need to charge you for any additional checks we decide are necessary to prove the source of the funds. Where we have to pay money to you, it will be paid by cheque or bank transfer. It will not be paid in cash or to any third party.

11. **Communication and information management**

11.1 **Our communication with you**

Where appropriate, it is our practice to use email, and these will be encrypted when sending documents and correspondence to clients. The email encryption system we use is supplied by FRAMA (a third-party provider). Although these are an extremely effective means of communication, we are unable to guarantee the security and confidentiality of material sent over the internet and we accept no responsibility for any error, loss or claim which arises as a result of any failure of security or confidentiality. If you have provided us with your email address, please tell us if you do not want us to communicate with you via the Internet.

We check all communications with antivirus software, but again, cannot guarantee that transmissions will be free from infection, and we recommend that you also use your anti-virus software. We operate a firewall and automatic spam filter. These may block a small number of genuine emails so that they do not reach their intended recipient at the firm. In such circumstances we will not be liable for any loss, damage, costs, interest, and expense you may incur directly or indirectly as a result.

You agree that to ensure regulatory compliance and for the protection of our clients and business, we may monitor and read emails and attachments sent to and from any member of our company.

11.2 **Confidentiality**

We have a professional obligation to keep all of the information that you provide to us confidential. However, there may be instances where we are required by law to disclose information to the appropriate authorities in compliance with the money laundering regulations (we may not be entitled to tell you that we have disclosed this information). There may be instances where we disclose matters to third parties, on your instructions, who fail to keep matters confidential despite obligations that they may have to do so. In such instances, we will not be liable for any breaches of disclosure.

11.3 **Data Protection and GDPR**

We use your personal information to provide you with our professional advisory services and we respect and value your privacy. We explain here your privacy rights and how we will use and protect your personal information. For more detailed information please refer to our full privacy notice at www.slswillsandmore.co.uk/client-information.

If you have any questions about how we use and protect your information please contact Sara Sheppard at sara@slswillsandmore.co.uk by telephone at 01304 577998, or by post at Office 4 Garrity House, Miners Way, Aylesham, Canterbury, CT3 3BF.

We must use your personal information to honour our contractual arrangements with you. We may provide new information to you from time to time because we have a legitimate interest in making sure you are kept aware of the newest legal and financial information related to our services.

We share certain information with other companies to deliver our services to you (email providers, secure storage providers, bookkeepers, etc.) and we make sure they handle your information professionally and securely. If you want to know more about our providers and their security arrangements, please get in touch.

We keep your information for as long as is necessary to ensure your advice is sound and legally robust. We use secure external document storage providers (where requested that we do so) to make sure paperwork is kept safely and securely.

You have rights to access the personal information we use, along with some other rights to deletion, to restrict our use of it and to lodge a complaint about our use of it with the regulator (the Information Commissioner's Office). For further details please see our full privacy notice in Appendix 2).

12. **Limitation of liability**

We will maintain professional indemnity insurance for an amount of £2.5m. If there is a claim of any sort against us by you, our liability to you will in any case be limited to this amount. We will not be liable for any consequential, special, indirect or exemplary damages, costs or losses, or any damages, costs or losses attributable to lost profits or opportunities.

SLS Wills and More Ltd is not regulated by the Solicitors Regulation Authority but employs solicitors who are regulated in their right. If you make a valid claim against us for a loss arising out of work for which we are legally responsible, and we are unable to meet our liability in full, you will not be entitled to claim from the Compensation Fund administered by the Solicitors Regulation Authority.

If we at SLS Wills and More Ltd fail to perform the Services with care and skill we will carry our remedial action at no extra cost to you as our client.

We at SLS Wills and More Ltd shall not be liable to you as Client or be deemed to be in breach of these Terms and Conditions by reason of any delay in performing, or any failure to perform, any of our obligations if the delay or failure was due to any cause beyond our reasonable control or where you as the Client has failed to meet their obligations under Clause 3.3 above

13. **Termination and Notice of Right to Cancel**

Termination

You may terminate your instructions in writing at any time.

We will only stop acting for you on reasonable grounds, for example:

- serious or persistent late payment of or failure to pay our invoices for whatever reason;
- failure to comply with our request for a payment on account;
- failure to give clear, proper, or timely instructions on how we are to proceed;
- if it is clear that there is no longer sufficient trust and confidence between us; or
- where a conflict of interest arises or emerges in connection with a matter on which we are advising you.

Where appropriate, we will give you reasonable notice we will cease acting for you. Our retainer to act for you in any specific matter will in any event end when we have fulfilled your instructions concerning that matter.

If you or we decide to terminate our relationship, you must still pay our charges and disbursements for the period until we cease acting for you and any other post-retainer charges mentioned in this document (for example, for storage and retention).

If you or we decide to terminate our relationship, you must still pay our charges and disbursements for the period until we cease acting for you and any other post-retainer charges mentioned in this document (for example, for storage and retention).

14. **Storage of Papers and Documents**

When we conclude your matter, your file (or an electronic copy) will be retained for 6 years (Probate) or for your life (Lasting Powers of Attorney) or your life plus 6 years (Will). Thereafter, the file will be destroyed. We will not, of course, destroy any documents such as Wills, Deeds and other securities,

which you ask us to hold in safe custody. No charge will be made to you for storage of our files unless prior notice in writing is given to you of a charge to be made from such future date as may be specified in that notice.

If on request from you or someone on your behalf, we are asked to retrieve papers or documents from storage, we may make a charge based on time spent, and we may request payment in advance. We may also charge for reading, correspondence or other work necessary to comply with your instructions.

Please read the above terms carefully and ensure you understand them before signing.

I/We accept the above terms of business and agree to abide by them and to be bound by them. We acknowledge that we have received a copy of this agreement.

I/We understand that under The Consumer Contracts (Information, Cancellation and Additional Charges) Regulations 2013 I/We have the right to cancel this contract within 14 days beginning when the contract is entered into.

I/We wish you to commence work on this contract before the expiration of the cancellation period.

I/We understand that if I/We subsequently cancel the contract with the cancellation period I/We will be under a duty to pay following reasonable requirements of the cancelled contract for work undertaken before the cancellation.

Signed Client 1:

Print Name:

Dated:

Signed Client 2:

Print Name:

Dated:

Date:01/02/2024

Appendix 1 Complaints Policy

SLS Wills and More Limited takes client care responsibly and seriously including where if a customer is dissatisfied with the service received.

Sara Sheppard TEP FSWW is the sole Director of SLS Wills and More Limited and is a Fellow of The Society of Wills Writers a registered TEP and a member of The Society of Trust and Estate Practitioners. As such, we are bound by the Codes of Practice of each organisation including their complaint procedures.

What is a complaint?

A complaint is defined as “any expression of dissatisfaction, whether oral or written, and whether justified or not, from or on behalf of an eligible complainant about the provision of, or failure to provide, will writing services and other connected services”.

Our Procedure

We would prefer any complaints in writing or by email, but we are willing to discuss concerns over the phone. We will aim to acknowledge your complaint within 24 hours to investigate and report back and resolve it within 7 working days.

What happens if you are still dissatisfied?

If you are not satisfied with the response given, you are entitled to make a complaint directly to the Society of Will Writers or the Society of Trust and Estate Practitioners, who will then investigate and report back to you within 7-14 working days. Such a complaint **must** be made in writing.

How to contact:

SLS Wills and More Ltd: sara@slswillsandmore.co.uk or 01304 577998 or 07951 736021

Society of Will Writers: www.willwriters.com/making-a-complaint or 01522 687888

Society of Trust and Estate Practitioners: www.step.org/disciplinary-process or 020 3752 3700

Appendix 2 Privacy Notice as at 1st January 2023

SLS Wills and More Limited Privacy Policy Notice

Our contact details

Name: Sara Sheppard

Address: Office 4, Garrity House, Miners Way, Aylesham
CT3 3BF

Phone Number: 01304 577998

E-mail: sara@slswillsandmore.co.uk or admin@slswillsandmore.co.uk

The type of personal information we collect

We currently collect and process the following information:

- Personal identifiers, contacts, and characteristics (for example, name and contact details), which may also include dates of birth and National Insurance Number. On some occasions, we may need specific financial information, such as for applications for probate or Court of Protection applications.
- For employees, we will need bank account details for running payroll in addition to the personal identifiers described above.

How do we get personal information and why do we have it

Most of the personal information we process is provided to us directly by you for one of the following reasons:

- For making a Will and/or Lasting Power of Attorney.
- For assisting with Probate or Court of Protection applications.
- For employment reasons.

We may also receive personal information indirectly, from the following sources in the following scenarios:

- From any other professional adviser that you have instructed and who refers you to SLS Wills and More Limited for our services

We use the information that you have given us to prepare the documents which you have instructed us to prepare, or for an employee, to run payroll including making pension contributions where appropriate.

We may share this information with our Accountant and Bookkeeper for completing company accounts and tax returns.

Under the General Data Protection Regulation (GDPR), the lawful bases we rely on for processing this information are:

(a) Your consent. You can remove your consent at any time. You can do this by contacting Sara Sheppard

(b) We have a contractual obligation.

(c) We have a legal obligation.

How we store your personal information

Your information is securely stored at Office 4, Garrity House, Miners Way, Aylesham CT3 3BF

We keep all personal information for the remainder of your life plus a further 7 years. We retain this in case there is any dispute or claims after your death. We will then dispose of your information by deleting it from our digital records and destruction of any paper records that we still hold by this date.

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Your data protection rights

Under data protection law, you have rights including:

- **Your right of access** - You have the right to ask us for copies of your personal information.
- **Your right to rectification** - You have the right to ask us to rectify personal information you think is inaccurate. You also have the right to ask us to complete information you think is incomplete.
- **Your right to erasure** - You have the right to ask us to erase your personal information in certain circumstances.
- **Your right to restriction of processing** - You have the right to ask us to restrict the processing of your personal information in certain circumstances.
- **Your right to object to processing** - You have the right to object to the processing of your personal information in certain circumstances.
- **Your right to data portability** - You have the right to ask that we transfer the personal information you gave us to another organisation, or you, in certain circumstances.

You are not required to pay any charge for exercising your rights. If you make a request, we have one month to respond to you.

Please contact us at sara@slswillsandmore.co.uk or in writing at Office 4, Garrity House, Miners Way, Aylesham, CT3 3BF if you wish to make a request.

How to complain

If you have any concerns about our use of your personal information, you can make a complaint to us at SLS Wills and More Limited, Office 4, Garrity House, Miners Way, Aylesham CT3 3BF or by email to sara@slswillsandmore.co.uk

You can also complain to the ICO if you are unhappy with how we have used your data. The ICO's address:

Information Commissioner's Office
Wycliffe House
Water Lane
Wilmslow
Cheshire SK9 5AF

Helpline number: 0303 123 1113 ICO website: <https://www.ico.org.uk>

Appendix 3 Cancellation Notice

This Cancellation Notice is set out in the form required by Consumer Contracts (Information, Cancellation and Additional Charges) Regulations 2013.

If you wish to cancel the contract **you MUST DO SO IN A CLEAR STATEMENT** and deliver personally or send (which may be by electronic mail) this to the Company at their address below. You may use this form if you want to, but you do not have to as long as you provide the information requested in the form below.

(Complete, detach and return this form **ONLY IF YOU WISH TO CANCEL THE CONTRACT AFTER OUR INITIAL MEETING**)

To: SLS Wills and More Limited T/A SLS Wills and More, 4 Garrity House, Miners Way, Aylesham, Canterbury CT3 3BF or admin@slswillsandmore.co.uk

I/We (delete as appropriate) hereby give notice that I/we (delete as appropriate) wish to cancel my/our (delete as appropriate) contract

Ref: _____ (can be found on your client care letter)

Date Contract Commenced: _____

Consultants Name: _____

Signed

Name and Address

Date