

## **Website Privacy Policy, Cookies Policy and Website Terms & Conditions**

### **Andrew Isaacs Law Limited**

This document comprises three parts:

- **Part A:** Website Privacy Policy
- **Part B:** Cookies Policy
- **Part C:** Website Terms & Conditions

For queries about this document or to exercise data protection rights, contact: [family@andrewisaacs.co.uk](mailto:family@andrewisaacs.co.uk).

### **Part A: Website Privacy Policy**

#### **1. Controller and Scope**

1.1 Andrew Isaacs Law Limited is the controller of personal data collected through this website.

1.2 References in this policy to “the Firm”, “we”, “us” or “our” mean Andrew Isaacs Law Limited.

1.3 Our details are:

Andrew Isaacs Law Limited  
Unit 7, Atlas Business Park  
Balby Carr Bank  
Doncaster  
DN4 5JT

Company number: **09631443**

ICO registration number: **ZA533004**

SRA number: **626263**

Email: [family@andrewisaacs.co.uk](mailto:family@andrewisaacs.co.uk)

Telephone: **01302 349480**

1.4 This Website Privacy Policy applies to personal data collected through this website, including personal data submitted through enquiry forms, recruitment forms, newsletter sign-ups, event forms, feedback forms, cookies and similar technologies.

1.5 This website is intended for users accessing it from within the United Kingdom. If you access the website from outside the United Kingdom, you do so on your own initiative and are responsible for compliance with any applicable local laws.

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## **2. Information We Collect**

2.1 We may collect personal data that you provide to us through the website, including:

- name;
- address;
- email address;
- telephone number;
- matter type;
- enquiry details;
- free text message content;
- preferred contact details;
- newsletter or marketing preferences;
- event registration details;
- feedback responses;
- recruitment information, including CVs, cover letters, employment history, qualifications and references.

2.2 We may also collect technical and usage data automatically when you use the website, including:

- IP address;
- device identifiers;
- browser type and version;
- time zone setting;
- operating system and platform;
- referral source;
- pages viewed;
- session duration;
- clickstream data;
- in-page interactions;
- cookie preferences;
- analytics information, subject to your cookie choices.

2.3 If you make an enquiry about our legal services or related services, you may choose to provide information about your matter. This may include sensitive information, depending on the nature of your enquiry.

2.4 Where an enquiry relates to family, private client, Court of Protection, financial remedy, trust, estate, property, tax-related, financial analysis, inheritance tax, capital gains tax, succession planning or similar matters, the information you provide may include financial, tax, property, family, health, relationship, children’s, trust, estate, source of funds or source of wealth information.

2.5 You should not submit special category data, criminal offence data, detailed tax records, bank statements, source of wealth documents, trust documents, estate papers, court documents or other highly confidential material through general website forms unless specifically requested by us or unless it is necessary for the enquiry.

### 3. Purposes and Lawful Bases

3.1 We process personal data for the purposes set out below.

Purpose	Examples	Lawful Basis
Responding to enquiries	Dealing with website enquiries, arranging appointments, providing information about services	Contract or steps prior to entering into a contract; legitimate interests
Considering whether we can act	Initial conflict checks, matter assessment, risk assessment, scope assessment	Legitimate interests; legal obligation where applicable
Providing legal services and related professional support	Where an enquiry becomes a client matter	Contract; legal obligation; legitimate interests
Ancillary tax-related advisory support, financial analysis, trust and estate advisory work	Where relevant to a legal matter and within the agreed retainer	Contract; legal obligation; legitimate interests; legal claims where applicable

AML, sanctions and financial crime compliance	Identity verification, source of funds, source of wealth, PEP and sanctions screening	Legal obligation; substantial public interest where applicable
Website operation and security	Website hosting, troubleshooting, monitoring, cyber security, fraud prevention	Legitimate interests; legal obligation where applicable
Website analytics	Understanding site usage and improving website performance	Consent for non-essential cookies; legitimate interests for essential security logs
Marketing communications	Newsletters, legal updates, events, service updates	Consent or soft opt-in where permitted; legitimate interests where appropriate
Recruitment	Reviewing applications, arranging interviews, assessing candidates	Steps prior to contract; legitimate interests; legal obligation
Complaints, claims and risk management	Handling complaints, insurance, professional indemnity and legal claims	Legitimate interests; legal obligation; legal claims
Compliance with legal and regulatory obligations	SRA, court, HMRC, ICO, Legal Ombudsman, AML and other obligations	Legal obligation; legitimate interests; substantial public interest where applicable

3.2 Where we process special category data, we will identify an Article 9 UK GDPR condition. Common conditions include:

- establishment, exercise or defence of legal claims;
- substantial public interest under the Data Protection Act 2018;
- explicit consent, where appropriate;

- vital interests, in rare emergency circumstances.

3.3 Where we process criminal offence data, we will do so only where authorised under the Data Protection Act 2018 and subject to appropriate safeguards.

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#### **4. Ancillary Tax, Financial Analysis, Trust and Estate Advisory Information**

4.1 The Firm may provide ancillary tax-related advisory support, financial analysis support, and trust and estate advisory work where relevant to a client matter and within the agreed scope of retainer.

4.2 Website enquiries may therefore relate to:

- inheritance tax;
- capital gains tax;
- property structures;
- business interests;
- trusts;
- estates;
- succession planning;
- financial remedy settlements;
- proposed transactions or arrangements;
- source of funds;
- source of wealth;
- asset analysis.

4.3 Personal data provided in connection with these enquiries may be used to:

- assess whether we can assist;
- identify the appropriate person to respond;
- undertake conflict and compliance checks;
- scope the matter;
- provide legal services and related professional support if instructed;
- comply with legal, regulatory, AML and professional obligations;
- manage risk, complaints, insurance and legal claims.

4.4 Unless expressly agreed otherwise in writing, the Firm does not undertake through this website:

- tax return preparation;
- tax return filing;
- HMRC compliance submissions;
- routine tax compliance work;
- bookkeeping;
- payroll;
- statutory audit;
- company statutory accounts preparation;
- corporation tax compliance for trading companies;
- aggressive tax avoidance arrangements;
- contentious tax litigation;
- specialist cross-border tax work.

4.5 If such information is submitted to us, we will process it only where necessary and lawful, including to respond to the enquiry, comply with legal obligations, assess whether we can assist, or manage risk.

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## **5. Special Category Data and Children's Data**

5.1 Special category data should not be submitted through website forms unless specifically requested for a defined purpose or unless it is necessary for your enquiry.

5.2 Where special category data is received, we will apply appropriate safeguards and process it only where a valid Article 9 UK GDPR condition applies.

5.3 The website is not intended for use by children. If you believe that a child has provided personal data through the website, please contact us so that we can address the matter appropriately.

5.4 Where a website enquiry concerns children, family proceedings, safeguarding, Court of Protection, vulnerable adults, trusts, estates or similar matters, we will process any related personal data with appropriate care and confidentiality.

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## **6. Sharing and Recipients**

#### 6.1 We may share personal data on a need-to-know basis with:

- internal teams and staff dealing with your enquiry or matter;
- solicitors, fee earners, paralegals and support staff;
- suitably qualified non-solicitor specialist employees where relevant to the matter;
- counsel;
- experts;
- accountants;
- external tax advisers;
- valuers;
- financial advisers;
- trustees;
- executors;
- deputies;
- attorneys;
- estate administrators;
- courts and tribunals;
- HMCTS;
- HM Land Registry;
- HMRC, where legally required or authorised;
- the Office of the Public Guardian;
- regulators, including the SRA and ICO;
- the Legal Ombudsman;
- professional indemnity insurers and brokers;
- banks and payment providers;
- identity verification and screening providers;
- IT, hosting, cyber security, analytics, communications, case management and cloud service providers.

6.2 Current third-party platforms commonly used by the Firm may include, without limitation:

- LEAP case management;
- Microsoft 365;
- Egress secure email/file exchange;
- Adobe / Adobe Sign;
- HMCTS portals;
- HM Land Registry;
- InfoTrack;
- Bundle Pro;
- SurveyMonkey;
- Mailchimp;
- analytics and website tools, as explained in the Cookies Policy.

6.3 All processors are required to process personal data under appropriate UK GDPR-compliant terms.

6.4 We will not sell your personal data.

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## **7. International Transfers**

7.1 Some of our service providers may process personal data outside the United Kingdom.

7.2 Where personal data is transferred outside the United Kingdom, we will ensure that an appropriate transfer mechanism is in place, such as:

- UK adequacy regulations;
- UK International Data Transfer Agreement;
- EU Standard Contractual Clauses with UK Addendum;
- UK-US Data Bridge / Data Privacy Framework participation for certified entities;
- another lawful transfer mechanism.

7.3 We keep transfer safeguards under review and use transfer risk assessments where required.

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## 8. Retention

8.1 We retain personal data only for as long as necessary for the purpose for which it was collected, subject to legal, regulatory, professional, insurance, risk management and limitation requirements.

8.2 Typical website-related retention periods are:

Record Type	Typical Retention Period
General website enquiries not becoming client matters	Up to 24 months
Enquiries becoming client matters	Retained as part of the matter file under our Records Management and Retention Policy
Marketing records	Until opt-out, plus a suppression record
Recruitment applications — unsuccessful candidates	Usually up to 12 months, unless otherwise stated or agreed
Event registrations and feedback	Usually up to 24 months unless required for longer
Server and security logs	Usually up to 12 months, unless required for security investigation or legal purposes
Cookie consent records	As required to evidence consent and preferences

8.3 Client matter files and related records are retained in accordance with our Records Management and Retention Policy.

8.4 Where a matter involves ancillary tax-related advisory support, financial analysis support, trust or estate advisory work, records will be retained in accordance with the underlying matter type and applicable retention requirements.

8.5 At the end of the relevant retention period, data will be securely erased or destroyed unless a legal hold or lawful basis for continued retention applies.

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## 9. Your Rights

9.1 Under UK GDPR, you may have the following rights:

- right to be informed;
- right of access;
- right to rectification;
- right to erasure;
- right to restriction;
- right to data portability, where applicable;
- right to object;
- right to object to direct marketing;
- rights relating to solely automated decision-making producing legal or similarly significant effects.

9.2 We do not conduct solely automated decision-making producing legal or similarly significant effects through the website.

9.3 To exercise your rights, contact [family@andrewisaacs.co.uk](mailto:family@andrewisaacs.co.uk).

9.4 We may require proof of identity before responding.

9.5 We will usually respond within one month. This may be extended where permitted by law.

9.6 Rights may be subject to exemptions, including where information is protected by legal professional privilege, confidentiality, legal claims, third-party rights, crime and taxation exemptions, regulatory obligations or statutory restrictions.

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## 10. Security

10.1 We apply appropriate technical and organisational measures to protect personal data, including:

- access controls;
- encryption;
- secure cloud platforms;
- endpoint protection;
- email security;

- monitoring;
- backup and recovery processes;
- role-based permissions;
- staff training;
- confidentiality obligations;
- processor due diligence.

10.2 Website communications are not always completely secure. You should avoid submitting unnecessary sensitive information through general website forms.

10.3 If you need to provide highly confidential information, including tax, financial, trust, estate, medical, court, children's, AML, source of funds or source of wealth documents, we may ask you to use a secure method of transmission.

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## **11. Marketing Preferences**

11.1 Where we rely on consent for marketing, you may withdraw that consent at any time.

11.2 Where we rely on the soft opt-in, you may opt out at any time.

11.3 You can opt out by using the unsubscribe link in our emails or by contacting [family@andrewisaacs.co.uk](mailto:family@andrewisaacs.co.uk).

11.4 We may retain a suppression record to ensure that we do not send further marketing to you after you opt out.

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## **12. Complaints**

12.1 If you have concerns about how we use personal data, please contact us first at [family@andrewisaacs.co.uk](mailto:family@andrewisaacs.co.uk).

12.2 You also have the right to complain to the Information Commissioner's Office:

Website: [www.ico.org.uk](http://www.ico.org.uk)

Telephone: 0303 123 1113

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## **13. Changes to This Notice**

13.1 We may update this Website Privacy Policy from time to time.

13.2 Material changes will be highlighted on this page where appropriate.

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## Part B: Cookies Policy

### 1. About Cookies

1.1 Cookies are small text files placed on your device when you visit a website.

1.2 Cookies help websites function, improve performance, remember preferences, provide security, and collect analytics information.

1.3 Some cookies are strictly necessary. Others are optional and require consent under the Privacy and Electronic Communications Regulations.

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### 2. How We Use Cookies

2.1 We group cookies into the following categories:

Cookie Type	Purpose	Consent Required?
Strictly necessary cookies	Core website functionality, security, accessibility, form operation and fraud prevention	No
Performance / analytics cookies	Understanding how visitors use the website and improving performance	Yes
Functionality cookies	Remembering preferences such as region or language	Yes
Advertising / targeting cookies	Personalising content or advertising and measuring effectiveness	Yes

2.2 Non-essential cookies are set only where you have given consent through our cookie banner or preference tool.

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### 3. Third-Party Cookies and Services

3.1 Depending on site configuration, we may use third-party services such as:

- Google Analytics;

- Google Ads / AdSense;
- Microsoft Clarity;
- WordPress core and plugins;
- Wordfence;
- Google Fonts;
- Google Maps;
- YouTube;
- Google reCAPTCHA;
- LiveChat or equivalent;
- Facebook, X/Twitter, LinkedIn or other social media integrations.

3.2 Third-party providers process data in accordance with their own privacy notices.

3.3 Non-essential cookies from third-party services are set only with your consent, unless they are strictly necessary for site security or operation.

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#### **4. Consent Management**

4.1 On your first visit, our cookie banner allows you to accept, reject or manage non-essential cookies by category.

4.2 You can change your preferences at any time via the cookie settings link on the website.

4.3 If you disable certain cookies, some website features may not function properly.

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#### **5. Retention and Control**

5.1 Cookie lifetimes vary by category and provider.

5.2 A current cookie list with names, purposes and lifetimes should be made available through the website's cookie preference tool or on request.

5.3 You can also control cookies through your browser settings.

5.4 Blocking all cookies may affect website functionality.

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#### **6. Do Not Track**

6.1 Our website does not currently respond to “Do Not Track” browser signals.

6.2 Your preferences set through our cookie banner or cookie settings tool will be applied.

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## **7. Changes to This Cookies Policy**

7.1 We may update this Cookies Policy to reflect changes in law, technology, cookies used or website functionality.

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## **Part C: Website Terms & Conditions**

### **1. About Us and Regulatory Status**

1.1 This website is operated by Andrew Isaacs Law Limited.

Andrew Isaacs Law Limited  
Unit 7, Atlas Business Park  
Balby Carr Bank  
Doncaster  
DN4 5JT

Company number: **09631443**

ICO registration number: **ZA533004**

SRA number: **626263**

Email: [family@andrewisaacs.co.uk](mailto:family@andrewisaacs.co.uk)

Telephone: **01302 349480**

1.2 Andrew Isaacs Law Limited is authorised and regulated by the Solicitors Regulation Authority.

1.3 These Website Terms & Conditions are governed by the law of England and Wales. The courts of England and Wales will have exclusive jurisdiction, subject to any mandatory legal rights that cannot be excluded.

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### **2. Acceptance of Terms**

2.1 By using this website, you agree to these Website Terms & Conditions, the Website Privacy Policy and the Cookies Policy.

2.2 If you do not agree, you must not use the website.

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### **3. No Legal, Tax or Professional Advice**

3.1 The content on this website is for general information only.

3.2 It is not legal advice, tax advice, financial advice, accounting advice, investment advice, audit advice, or other professional advice.

3.3 You must not rely on website content as advice on your specific circumstances.

3.4 Use of this website, submission of an enquiry, or communication through the website does not create a solicitor-client relationship.

3.5 A solicitor-client relationship is created only when the Firm agrees to act for you and issues appropriate client care and retainer documentation.

3.6 Where the website refers to ancillary tax-related advisory support, financial analysis support, trust and estate advisory work, those services are available only where relevant to a legal matter and within an agreed retainer.

3.7 Unless expressly agreed in writing, the Firm does not provide through this website:

- tax return preparation;
- tax return filing;
- HMRC compliance submissions;
- routine tax compliance;
- bookkeeping;
- payroll;
- statutory audit;
- company statutory accounts preparation;
- corporation tax compliance for trading companies;
- investment advice;
- regulated financial advice;
- aggressive tax avoidance arrangements;
- contentious tax litigation;
- specialist cross-border tax advice.

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### **4. Website Use and Acceptable Conduct**

#### 4.1 You agree not to:

- use the website for unlawful purposes;
  - use the website in a way that could damage, disable, overburden or impair it;
  - transmit malware or malicious code;
  - attempt unauthorised access to the website, server, network or systems;
  - interfere with website security;
  - scrape, harvest or systematically extract website data without prior written consent;
  - upload defamatory, offensive, unlawful, confidential, privileged or infringing content;
  - impersonate another person;
  - submit false or misleading information.
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### **5. Enquiries Submitted Through the Website**

5.1 Website enquiry forms are intended for initial contact only.

5.2 You should not send urgent instructions through the website.

5.3 You should not send original documents, court deadlines, time-critical instructions, bank details, tax return materials, HMRC submissions, source of wealth documents, or highly sensitive material unless we have specifically asked you to do so and provided an appropriate method.

5.4 We are not responsible for any missed deadline or loss arising from reliance on a website enquiry form where we have not agreed to act.

5.5 We may decline to respond to or act on any enquiry.

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### **6. Intellectual Property**

6.1 Unless stated otherwise, all website content, including text, graphics, logos, icons, images, downloads, templates, layout, design and other materials, is owned by or licensed to Andrew Isaacs Law Limited.

6.2 Website content is protected by intellectual property laws.

6.3 You may view, download and print content for personal, non-commercial use only.

6.4 Any other use requires our prior written permission.

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## **7. Accuracy and Availability**

7.1 We endeavour to keep website information accurate and up to date.

7.2 We do not give any representation, warranty or guarantee that website content is accurate, complete, current or suitable for your circumstances.

7.3 Legal, tax and regulatory information may change.

7.4 We do not guarantee that the website will always be available, uninterrupted, secure, error-free or free from viruses.

7.5 Access may be suspended, withdrawn or restricted without notice for maintenance, updates, security or operational reasons.

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## **8. Third-Party Links**

8.1 The website may contain links to third-party websites.

8.2 Links are provided for convenience only.

8.3 We have no control over third-party websites and accept no responsibility for their content, security, availability, accuracy, privacy practices or data handling.

8.4 Use of third-party websites is at your own risk.

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## **9. Liability**

9.1 To the fullest extent permitted by law, we exclude liability for loss or damage arising from:

- use of the website;
- inability to use the website;
- reliance on website content;
- website unavailability;
- viruses or cyber incidents outside our reasonable control;
- third-party links;
- incomplete or inaccurate information submitted by users.

9.2 We exclude liability for:

- loss of profit;
- loss of business;
- loss of data;
- loss of opportunity;
- business interruption;
- indirect or consequential loss, to the extent permitted by law.

9.3 Nothing in these terms excludes or limits liability for:

- death or personal injury caused by negligence;
- fraud;
- fraudulent misrepresentation;
- any liability that cannot lawfully be excluded or limited.

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## **10. Security and Misuse**

10.1 You are responsible for configuring your technology, devices and systems to access the website safely.

10.2 You should use appropriate virus protection.

10.3 Misuse of the website may constitute a criminal offence.

10.4 We may report misuse to law enforcement and disclose relevant information where lawful and appropriate.

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## **11. Changes to These Terms**

11.1 We may update these Website Terms & Conditions from time to time.

11.2 Changes take effect when posted on the website.

11.3 Your continued use of the website after changes are posted constitutes acceptance of the updated terms.

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## **12. Contact**

12.1 For website issues, contact:

Andrew Isaacs Law Limited  
Unit 7, Atlas Business Park  
Balby Carr Bank  
Doncaster  
DN4 5JT

Email: [family@andrewisaacs.co.uk](mailto:family@andrewisaacs.co.uk)

Telephone: **01302 349480**

12.2 Our complaints procedure is available on request or at:

<https://www.andrewisaacs.co.uk/complaints-policy/>