

The Rowan Tree

Privacy Notice (Full Version – UK GDPR)

Support Services & Funeral Celebrancy

1. Introduction

This Privacy Notice explains how **The Rowan Tree** collects, uses, stores, and protects personal information.

I am committed to respecting your privacy and handling personal information with care, sensitivity, and transparency. I understand that people may share information with me at times of vulnerability, change, or loss, and I take this responsibility seriously.

This notice applies to all services provided by The Rowan Tree, including:

- support and befriending services, and
- funeral celebrancy services.

2. Who I am (Data Controller)

The Rowan Tree is the data controller for the personal information described in this notice.

Name: Lisa Lee

Business name: The Rowan Tree

Location: North Wales

Contact details:

Email: lisa@the-rowan-tree.co.uk

Phone: 07923 058292

3. The personal information I collect

I only collect information that is relevant and necessary for the services I provide.

This may include:

a) Personal details

- Name
- Address
- Telephone number
- Email address

b) Service-related information

- Information about support needs or preferences

- Information shared when planning or delivering a funeral ceremony
- Notes from meetings, conversations, or correspondence

c) Family, representatives, and professionals

- Details of next of kin, family members, advocates, or professionals involved, where relevant

d) Financial information

- Invoicing and payment records

e) Special category data (where applicable)

In some situations, I may hold sensitive information, such as:

- health information
- information relating to vulnerability or safeguarding
- information about beliefs, values, or personal history shared for a funeral ceremony

I only collect this information where it is necessary and appropriate.

4. How I collect information

Personal information may be collected:

- directly from you
- from someone acting on your behalf (for example, a family member or professional)
- through written, verbal, or electronic communication

5. Why I use your information (lawful basis)

Under UK GDPR, I must have a lawful reason for using personal data. These may include:

- **Consent** – where you have given clear permission
- **Contract** – where information is needed to provide an agreed service
- **Legal obligation** – for example, tax or safeguarding duties
- **Vital interests** – to protect someone from serious harm
- **Legitimate interests** – where information is needed to carry out my work responsibly and safely

For special category data, additional conditions apply, such as explicit consent or safeguarding obligations.

6. How your information is used

Your information may be used to:

- provide support services or funeral celebrancy services
- communicate with you clearly and reliably
- keep appropriate records
- manage invoicing and payments
- meet legal, safeguarding, or professional obligations

I do not use your information for marketing purposes.

7. Who I share information with

Your information is treated as confidential.

I may share information only where necessary, including with:

- professionals involved in your support or funeral arrangements
- local authorities or safeguarding bodies
- HMRC or other legal authorities where required

I only share what is necessary and appropriate. Wherever possible, I will explain what is being shared and why.

8. Safeguarding and legal duties

Where there is a concern about serious harm or risk, I may be required to share information without consent, in line with safeguarding law and guidance.

This may include sharing information with:

- Social Services
- the Police
- other relevant authorities

Such decisions are taken carefully and proportionately.

9. How I store and protect information

I take reasonable steps to keep personal information secure.

- Paper records are stored securely
- Electronic records are password-protected
- Access is limited to me as the service provider

10. How long I keep information

Information is kept only for as long as necessary.

Retention periods may depend on:

- legal or financial requirements
- safeguarding considerations
- professional good practice

When information is no longer required, it is securely deleted or destroyed.

11. Your data protection rights

Under UK GDPR, you have the right to:

- access the personal information I hold about you
- request correction of inaccurate information
- request deletion of information, where legally possible
- request restriction of processing in certain circumstances
- object to certain uses of your information
- withdraw consent where consent is the lawful basis

Requests can be made by contacting me using the details above.

12. Complaints

If you are unhappy with how your information has been handled, you have the right to complain to the Information Commissioner's Office (ICO):

Information Commissioner's Office

Telephone: 0303 123 1113

Website: www.ico.org.uk

I would encourage you to contact me first so I can try to resolve any concerns.

13. Changes to this Privacy Notice

This Privacy Notice may be updated from time to time to reflect changes in law or practice.

The most recent version will always be available on request.

Last updated: 12 January 2026