

OAKLANDS WEALTH MANAGEMENT PRIVACY NOTICE

YOUR PRIVACY IS IMPORTANT TO US

This notice informs you how we use the information you give us and how we protect your privacy. It also explains your rights under the UK Data Protection Act (update 2018) and the EU General Data Protection Regulations 2018. We abide by UK Law and our data protection regulator within the UK is the Information Commissioners Office (details below). Our licence number is Z8726459. This can be checked on www.ico.org.uk

Collecting of and purpose for your Information

We aim to offer advice that helps you plan your financial future. To provide such a service, we may need to collect personal data such as employment, income, expenses, financial arrangements you hold, family details and legal commitments. This is required in order for us to provide you with a full financial planning service.

Medical details may be required in order to provide relevant insurance products and/or claims handling services that may be suitable. Any medical details will always be kept confidential within the firm and if shared will be marked Private & Confidential to the Medical Officer of the recommended insurance product.

Your information may be used to introduce you to a range of products and services we offer, to help with ongoing administration, to contact you with any review or changes that are applicable, for our own business research and analysis or for the processing of a claim.

Withholding of the required data may result in an insufficient service being provided or future claims being declined.

We may obtain data from individual customers, from introducer companies or from employers. This may include product providers, pension scheme trustees, your accountant, solicitor or tax adviser, where applicable.

We will not obtain information from any third party unless we have additional consent from you.

Sharing your data

We may share your personal data with the following organisations –

- Your Insurer/Provider/Lender with whom we obtain quotations and with whom we agree to place your business
- The Financial Conduct Authority with whom we are regulated or other regulated bodies as required
- Any Law enforcement entities as required in UK Law
- We may verify your identity by searching publicly available records held by credit reference agencies
- Standards International, our Professional Indemnity insurance company and our compliance consultant.

We will not share your information with any other third parties unless we have obtained additional consent from you.

Your rights regarding your data –

- ❖ We will not hold your information for any longer than is necessary and as a maximum no longer than 5 years after you have terminated as a client of our firm unless there is a lawful basis for retention
- ❖ Should your data be inaccurate we will rectify this without delay
- ❖ Should you wish us to delete your data at any point, please contact the office as shown further below to make the request. This will be actioned unless there is a lawful basis for us to retain the information in which case you will be advised accordingly
- ❖ Should you wish to transfer your data to another organisation, please contact the office as below and we will organise this for you
- ❖ You can request access to your data at any time. We will provide you with a full copy within one month of your request
- ❖ You can withdraw consent to us holding and processing your information at any time. Please contact the office as below should you wish to do this
- ❖ We may provide you with newsletters and bulletins which are appropriate to your plans on an ongoing basis.

Security

We have in place a full information security policy, business continuity and disaster recovery plans. We take data security very seriously and have in place we feel the most secure options available to store and transfer your data securely. We can provide details on request.

Our contact details - should you wish to contact us in relation to any issues within this notice, please contact:

Mrs Bridie Hood, The Data Protection Officer
Oaklands Wealth Management Ltd
12a Duke Street
Sutton Coldfield
B71 1RJ
0121 355 4455
info@oaklandswealth.com

You will be responded to as promptly as possible

Your right to complain – should you wish to make a complaint in relation to data protection issues relating to our firm, you can contact us as above or you can contact our regulator as follows:

The Information Commissioner’s Office
Wycliffe House, Water Lane, Wilmslow, Cheshire, SK9 5AF
Tel: 0303 123 1113 (local rate) or 01625 545 745 if you prefer to use a national rate number
www.ico.org.uk

Consent – We are required under the Regulations to obtain your consent to our collection, processing, sharing and holding of your personal data. Please ensure you have read this notice fully and accept all that it contains. If you have any queries, please contact us directly. Please contact us should you not be able to read or understand this notice sufficiently.

I agree to the terms within this notice

Full Name

Date.....