



Client Privacy Notice Updated April 2024

[DATE]
[COMPANY NAME]
[Company address]

Introduction

This privacy notice tells you what to expect us to do with your personal information.

Our contact details

Post: Add Wealth Management Ltd, The Old Municipal Buildings, 19 East Street, Bromley, Kent, BR1 1QE

Telephone: 020 3236 0920

Email: enquiries@addwealth.co.uk

What information we collect, use, and why

We collect or use the following information to provide services and goods, including delivery:

- Names and contact details
- Addresses
- Date of birth
- Payment details (including card or bank information for transfers and direct debits)
- Credit reference information
- Health information (including dietary requirements, allergies and health conditions)
- Account information
- Records of meetings and decisions
- Identification documents

We also collect or use the following information to provide services and goods, including delivery:

- Racial or ethnic origin
- Religious or philosophical beliefs
- Health information

We collect or use the following information for the operation of customer accounts and guarantees:

- Names and contact details

- Addresses
- Payment details (including card or bank information for transfers and direct debits)
- Marketing preferences

We also collect or use the following information for the operation of customer accounts and guarantees:

- Racial or ethnic origin
- Religious or philosophical beliefs
- Health information

We collect or use the following information to prevent crime, prosecute offenders, or defend against legal action:

- Names and contact information
- Customer or client accounts and records

We collect or use the following information for service updates or marketing purposes:

- Names and contact details
- Addresses
- Marketing preferences
- Records of consent, where appropriate

We collect or use the following information to comply with legal requirements:

- Identification documents

We also collect or use the following information to comply with legal requirements:

- Racial or ethnic origin
- Health information

Lawful **bases**

Our lawful bases for collecting or using personal information to provide services and goods are:

- Consent
- Legal obligation

Our lawful basis for collecting or using personal information for the operation of customer accounts and guarantees are:

- Consent

Our lawful basis for collecting or using personal information to prevent crime, prosecute offenders or defend against legal action are:

- Consent

Our lawful basis for collecting or using personal information for service updates or marketing purposes are:

- Consent

Our lawful basis for collecting or using personal information for legal requirements are:

- Consent

Where we get personal information from

- People directly

How long we keep information

Information being held:	Duration
Names and contact details	Duration of the service provided by Add Wealth Management and its subsidiary
Addresses	Duration of the service provided by Add Wealth Management and its subsidiary
Date of birth	Duration of the service provided by Add Wealth Management and its subsidiary
Payment details (including card or bank information for transfers and direct debits)	Duration of the service provided by Add Wealth Management and its subsidiary
Credit reference information	Duration of the service provided by Add Wealth Management and its subsidiary

Health information (including dietary requirements, allergies and health conditions)	Duration of the service provided by Add Wealth Management and its subsidiary
Account information	Duration of the service provided by Add Wealth Management and its subsidiary
Records of meetings and decisions	Duration of the service provided by Add Wealth Management and its subsidiary
Identification documents	Duration of the service provided by Add Wealth Management and its subsidiary

*If the client no longer uses our services due to no contact after 24 months of the original service ending, we will remove the client details from our system.

If the client no longer uses our services due to no contact after 24 months, but they have active protection or pension policies on the system, we will only remove the information not relevant to those policies.

Who we share information with

Other organisations;

- Insurance companies
- Health care providers
- Financial or fraud investigation authorities
- Organisations we're legally obliged to share personal information with

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 data.

Your right to rectification - You have the right to ask us to rectify personal data 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 data in certain circumstances.

Your right to restriction of processing - You have the right to ask us to restrict the processing of your personal data in certain circumstances.

Your right to object to processing - You have the right to object to the processing of your personal data in certain circumstances.

Your right to data portability - You have the right to ask that we transfer the personal data you gave us to another organisation, or to you, in certain circumstances.

Your right to withdraw consent – When we use consent as our lawful basis you have the right to withdraw your consent.

You don't usually need to pay a fee to exercise your rights. If you make a request, we have one calendar month to respond to you.

To make a data protection rights request, please contact us using the contact details at the top of this privacy notice.

How to complain

If you have any concerns about our use of your personal data, you can make a complaint to us using the contact details at the top of this privacy notice.

If you remain unhappy with how we've used your data after raising a complaint with us, you can also complain to the ICO.

The ICO's address:

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

Helpline number: 0303 123 1113

Website: <https://www.ico.org.uk/make-a-complaint>