

## IMPORTANT - HOW WE WILL USE YOUR PERSONAL INFORMATION

Sandringham Financial Partners are a leading provider of financial advice within the UK. We take your privacy seriously and will only use your personal information where necessary to provide you with the products and services you have contractually agreed with us, and to provide you with the best experience with our products. Any questions regarding our privacy practices should be sent by email to: [info@sandringham.co.uk](mailto:info@sandringham.co.uk), or by writing to Sandringham Financial Partners, 5th Floor, 30 Market Street, Huddersfield, HD1 2HG. Alternatively, you can telephone 01484 504900.

### How we collect your data

We obtain information about you during interaction with your financial adviser, from information requested from financial product providers or information you provide via our websites.

### What information is being collected?

We collect the information required to provide financial advice, apply for financial products and/or to provide you with our ongoing service. We use many different kinds of personal information, and group them together like this:

Contact • Financial • Socio-Demographic • Social Relationships • Contractual Communications • Open Data and Public Records • Usage Data • Documentary Data • Special types of data – e.g. Health, Religious, Criminal • Consents • National Identifier

For more information and a full list of the categories of information we collect please refer to our Privacy Policy at <http://client.sandringham.co.uk/privacy>

We may need to collect personal information by law, or under the terms of a contract we have with you. If you choose not to give us this personal information, it may delay or prevent us from meeting our obligations or obtaining the products and services requested. It could also mean that we cancel a product or service you have with us. Any data collection that is optional would be made clear at the point of collection.

### Why we process your data

We may use your information to:

- carry out our obligations arising from any contracts entered into by you and us
- provide you with financial advice
- act as your agent to purchase financial services products
- provide our Precision Ongoing Client Service
- provide a customised experience via our Wealth Platform client portal or other websites
- deal with any complaints which may arise in the future;
- provide you with information about other services we offer that are similar to those which you have already used or enquired about;
- seek your views or comments on the services we provide;
- notify you of changes to our services;
- send you communications which you have requested or that may be of interest

### How we share your data

We will not sell or rent your information to third parties. We will not share your information with third parties for marketing purposes. Your personal data will be treated as strictly confidential and will be shared only with our service providers (for the purposes described in this statement) or any financial product provider from whom products or services will be purchased.

We contractually require service providers to keep information secure and confidential and we do not allow our data processors to disclose your information to others without our authorisation, or to use it for their own purposes. Your data may also be transferred to the Financial Conduct Authority or any other statutory, governmental or regulatory body, if required.

To provide services to you we may be required to pass your personal information to product and service providers located outside of the European Economic Area (EEA) in countries that do not have Data Protection Laws equivalent to those in the UK.

By submitting your personal data, you're agreeing to this transfer, storing or processing of it. If we transfer your information outside of the EU in this way, we will take steps to ensure that appropriate security measures are taken with the aim of ensuring that your privacy rights continue to be protected as outlined in this Policy. For more information on how we may share your data please refer to our Privacy Policy at <http://client.sandringham.co.uk/privacy>

### How long we will keep it

We review our retention periods for personal information on a regular basis. We are legally required to hold some types of information to fulfil our statutory obligations (for example, our regulator, the Financial Conduct Authority require that records of our advice are kept for certain periods). We will hold your personal information on our systems for as long as is necessary for the relevant activity, or to fulfil our legal and statutory obligations.

### Access to your information and correction

You have the right to request a copy of the information that we hold about you. If you would like a copy of some or all of your personal information, please email or write to us at the address above. We may make a small charge for this service. We want to make sure that your personal information is accurate and up to date. You may ask us to correct or remove inaccurate information.

You have the right to ask us not to process your personal data for marketing purposes. We will usually inform you (before collecting your data) if we intend to use your data for such purposes. You can exercise your right to prevent such processing by checking/ ticking certain boxes we use to collect your data. You can exercise this right at any time by contacting us using our contact details set out below.

For more information on your rights concerning your personal data please view our Privacy Policy at <http://client.sandringham.co.uk/privacy>

### Further Information

For further information on how your information is used, shared and kept secure, please view our Privacy Policy at <http://client.sandringham.co.uk/privacy>