

Privacy Notice

**Newell Palmer - Committed to
protecting your personal information**



Privacy Notice

This privacy notice explains how we use any personal information we collect about you.

Who are we

We are the Newell Palmer Group incorporating:

- Newell Palmer & Associates Ltd
- Newell Palmer Financial Planning Ltd
- Newell Palmer Des Ltd
- Crombies Financial Services Ltd
- Newell Palmer Trustees Ltd
- Newell Palmer Group Services Ltd

What information do we collect about you?

We collect information about you when you engage us for financial planning advice. This information will relate to your personal and financial circumstances. It may also include special categories of personal data such as data about your health, if this is necessary for the provision of our services.

We may also collect information when you voluntarily complete client surveys or provide feedback to us.

Why do we need to collect and use your personal data?

The primary legal basis that we intend to use for the processing of your data is for the performance of our contract with you. The information that we collect about you is essential for us to be able to carry out the services that you require from us effectively. Without collecting your personal data we'd also be unable to fulfil our legal and regulatory obligations.

How will we use the information about you?

We collect information about you in order to provide you with the services for which you engage us.

Who might we share your information with?

If you have given us permission, we may email you about other products or services that we think may be of interest to you. We won't share your information for marketing purposes with companies outside our group of companies.

In order to deliver our services to you effectively we may send your details to companies we have chosen to support us in the delivery of the services we offer, such as those that we engage for professional compliance, accountancy or legal services as well as product and platform providers that we use to arrange financial products for you.

Where it's necessary for your personal data to be forwarded to a third party we'll use appropriate security measures to protect your personal data in transit, in line with our data protection obligations.

How long do we keep hold of your information?

In principle, your personal data shouldn't be held for longer than is required under the terms of our contract for services with you. However, we're subject to regulatory requirements to retain data for specified minimum periods. We also reserve the right to retain data for longer than this due to the possibility that it may be required to defend a future claim against us.

You have the right to request deletion of your personal data. We'll comply with this request, subject to the restrictions of our regulatory obligations and legitimate interests as noted above.

How can I access the information you hold about me?

You have the right to request a copy of the information that we hold about you. If you'd like a copy of some or all of your personal information please email or write to us using the contact details noted on page 3 of the document.

We have an obligation to ensure that your personal information is accurate and up to date. Please ask us to correct or remove any information that you think is incorrect.

Rights related to automated decision making and profiling

Your data is collected in order for us to carry out the service for which you engage us. If you're unsure about the outcome of an automated process you can contact us to discuss or to challenge the outcome.

When your personal data is processed by automated means you have the right to ask us to move your personal data to another organisation for their use.

Marketing

Some of the things we send are core parts of the service we offer and you will still get these. We'd like to send you information about our products and services and those of other companies in our group which may be of interest to you. If you've agreed to receive marketing information, you may opt out at a later date.

You have a right at any time to stop us from contacting you for marketing purposes or giving your information to other members of our group. If you no longer wish to be contacted for marketing purposes, then please let us know in writing or via email. Our address and email details can be found in the 'How to contact us' section of this document.

Cookies

These are text files placed on your computer to track visitor use of the website activity and help us to develop and improve your client experience.

Other websites

Our website contains links to other websites. This privacy policy only applies to this website so when you link to other websites you should read their own privacy policies.

What can you do if you are unhappy with how your personal data is processed?

You also have a right to lodge a complaint with the supervisory authority for data protection.

In the UK this is:

Information Commissioner's Office

Wycliffe House

Water Lane

Wilmslow

Cheshire SK9 5AF

T 0303 123 1113 (local rate)

Changes to our privacy policy

We keep our privacy policy under regular review so please check our website for updates from time to time. This privacy policy was last updated in April 2018.

How to contact us

Please contact us if you have any questions about our privacy policy or information we hold about you by emailing us at: gdpr@newellpalmer.co.uk

or write to us at:

Newell Palmer

Cleveland Court

Cleveland Street

Wolverhampton WV1 3HR



T 03330 433 444 • **F** 03330 433 445 • **E** info@newellpalmer.co.uk

Newell Palmer Wolverhampton • Cleveland Court, Cleveland Street, Wolverhampton, West Midlands WV1 3HR

Newell Palmer & Associates Ltd is an appointed representative of Newell Palmer Ltd which is authorised and regulated by the Financial Conduct Authority. Company Registration No. 05694669

Crombies Financial Services Ltd is an appointed representative of the Newell Palmer Group Ltd which is authorised and regulated by the Financial Conduct Authority. Company Registration No. 4320413

Newell Palmer Bromsgrove • The Croft, Buntsford Gate Business Park, Stoke Heath, Bromsgrove B60 4JE

Newell Palmer Financial Planning Ltd is an appointed representative of the Newell Palmer Group Ltd which is authorised and regulated by the Financial Conduct Authority. Company Registration No. 3298984

Newell Palmer Nuneaton • The Old Vicarage, Vicarage Street, Nuneaton CV11 4AZ

Newell Palmer - DES Ltd is an appointed representative of the Newell Palmer Group Ltd which is authorised and regulated by the Financial Conduct Authority. Company Registration No. 06992357