

Data Protection/Privacy Notice

Purpose of this Notice

Ramsay Brown Financial Services takes your privacy seriously. When we provide our services to you, we will collect personal information about you [and others] and we want to be open and transparent with you as to the types of information we collect about you, why we collect it, how we use it and who we may share it with.

The data controller of your personal information is **Ramsay Brown Financial Services (“we”, or “us”, or “our”)** a limited liability company registered at Ramsay House, 18 Vera Avenue, Grange Park, London, N21 1RA with company number 2517602.

If you have any questions or concerns about our use of your personal information, then please contact us using the contact details provided at the bottom of this Notice in the '**How to contact us**' section in this Notice.

Topics

- **What information do we collect about you?**
- **How will we use the information about you?**
- **Who might we share your information with?**
- **How long do we keep hold of your information?**
- **Your data protection rights**
- **Marketing**
- **Our website cookies and other websites**
- **What can you do if you are unhappy with how your personal data is processed?**
- **Changes to our privacy policy**
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What information do we collect about you?

In order to provide you with our personalised financial planning service it will be necessary for us to obtain detailed and accurate information relating to your personal and financial circumstances.

This may also include special categories of personal data which the law considers to be ‘sensitive’ such as data about your physical or mental health, your gender, relationship status etc.

More detailed examples regarding the types of personal information and special categories of personal data that we may collect from you (and the reasons why this data may be collected) are provided in the separate factsheet '**Types of personal information that we collect about you**' which accompanies this Notice.

How will we use the information about you?

The information we collect about you will be used to provide you with the services for which you have engaged us. Some specific examples of how we use the data we collect about you are provided in the previously mentioned **'Types of personal information that we collect about you'** factsheet which accompanies this Notice.

If you do not wish us to collect and use your personal information in these ways, it may mean that we will be unable to provide you with our services.

Who might we share your information with?

We may disclose your personal information to the following categories of recipients:

- **to providers of financial services, insurance and investment products and services in respect of whom you request** us to submit applications on your behalf and to receive updates from such providers in order for us to provide our services to you throughout the lifetime of our relationship with you;
- to our **suppliers and partners** in order for them to help us provide our services to you, this includes:
 - our **IT systems providers** to assist us with providing you with an efficient, modern and professional service;
 - our suppliers of **audit and regulatory compliance support services** who may review our records containing your personal information in order to audit and report to us on our compliance with applicable laws and regulatory requirements;
 - our **accountants, solicitors, insurer(s) and insurance broker(s)** and any other provider of professional services to us;
- to **other financial institutions or regulatory bodies** with whom information is shared for money laundering checks, credit risk reduction and other fraud and crime prevention purposes;
- to a **prospective buyer** (and its agents and advisers) in the event we intend to sell any part of our business or its assets or if substantially all of our assets are acquired by a third party.
- to any **national and/or international regulatory, enforcement body, government agency or court** where we believe disclosure is necessary.
- to any **other organisation and/or person with your consent** to the disclosure or where we are permitted to do so by law for example, your accountants, legal advisers etc.

We will never share your information for marketing purposes with other companies.

How long do we keep hold of your information?

The general principle is that your personal data should not be held for longer than is required under the terms of our contract for services with you. However, we may also keep your information after this period as we are subject to regulatory requirements to retain data for specified minimum periods.

Your data protection rights

You have the following data protection rights:

- If you wish to **access, correct, update or request deletion** of your personal information, you can do so at any time by contacting us using the contact details provided under the '**How to contact us**' section in this Notice.
- In addition, you can **object to processing** of your personal information, ask us to **restrict processing** of your personal information or **request portability** of your personal information. Again, you can exercise these rights by contacting us using the contact details provided under the '**How to contact us**' section in this Notice.
- Similarly, if we have collected and processed your personal information with your consent, then you can **withdraw your consent** at any time.
- You have the **right to complain to a data protection authority** about our collection and use of your personal information. For more information, please contact your local data protection authority. In the UK, this is the Information Commissioner's Office (ICO) <https://ico.org.uk/>

We respond to all requests we receive from individuals wishing to exercise their data protection rights in accordance with applicable data protection laws, subject to the restrictions of our regulatory obligations and our legitimate interests.

Marketing

We may occasionally wish to send you information about any other products and services which we offer and which we feel 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 the group. If you no longer wish to be contacted for marketing purposes, please contact us by email or post using the contact details provided under the '**How to contact us**' section in this Notice.

Our website cookies and other websites

We may use cookies to track visitor use of our website and to compile statistical reports on website activity. For further information visit <http://www.allaboutcookies.org/>

You can set your browser not to accept cookies and the above website tells you how to remove cookies from your browser.

Our website may contain links to other websites. This privacy policy only applies to our 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?

We will always strive to collect, use and safeguard your personal information in line with data protection laws. If you do not believe we have handled your information as set out in our Privacy Policy, the please contact us using the using the contact details provided under the '**How to contact us**' section in this Notice.

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.

Website: <https://ico.org.uk/>

Can I make a complaint?

- Yes, we are required to deal with any complaint you might make regarding the use of your data.
- To make a complaint, please contact us by email, telephone or in writing at address at the end of this notice.
- You may also complain to the Information Commissioner's Office (ICO) at any time, as we have highlighted to you in the section above.

Changes to our privacy policy

We may change or update this Notice in order to maintain our compliance with applicable law and regulation or following an update to our internal practices. When we update our Notice, we will take appropriate measures to inform you, consistent with the significance of the changes we make.

How to contact us

Please contact us if you have any questions about our privacy policy or information, we hold about you:

- by email at; steve@ramsaybrown.co.uk
- by phone: 020 8370 7715

- Or write to us at; Ramsay Brown Financial Services Limited, Ramsay House, 18 Vera Avenue, Grange Park, London, N21 1RA.

**Authorised and regulated by the Financial Conduct Authority
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