



## FAIR PROCESSING NOTICE

### 1. Scope

All data subjects whose data is processed by Core Financial Services Ltd.

### 2. Responsibilities

Mark Sutton is responsible for ensuring that this notice is placed in front of potential data subjects prior to Core Financial Services Ltd collecting/processing their personal data.

All Employees of Core Financial Services Ltd who interact with data subjects are responsible for ensuring that this notice is drawn to the data subject's attention and their consent to the processing of their data is secured.

### 3. Fair Processing Notice

The personal data we collect from you will be used for the following purposes:

- To provide advice and complete transactions on your behalf.
- To pass to third parties to enable us to provide advice most suited to your circumstances.
- To pass your data to institutions if you agree to purchase or amend policies and products.

By consenting to this, you are giving us permission to perform those actions.

You may withdraw consent at any time.

#### **What is Personal Data?**

Under the EU's General Data Protection Regulation, Personal Data is defined as

*"any information relating to an identified or identifiable natural person ('data subject'); an identifiable natural person is one who can be identified, directly or indirectly, in particular by reference to an identifier such as a name, an identification number, location data, an online identifier or to one or more factors specific to the physical, physiological, genetic, mental, economic, cultural or social identity of that natural person".*

#### **Special Categories of Personal Data**

Certain data is classified under the Regulation as "special categories":

- Racial
- Ethnic origin
- Political Opinions
- Religious Beliefs
- Trade-union membership
- Genetic Data
- Biometric Data
- Health Data
- Data concerning a natural person's sex life
- Sexual orientation
- Other

Consent is required for Core Financial Services Ltd to process both types of personal data, but it must be explicitly given. Where we are asking you for sensitive personal data we will always tell you why and how the information will be used.

**Why does *Core Financial Services Ltd* need to collect and store personal data?**

In order for us to provide you with services, we need to collect personal data for correspondence purposes and/or detailed service provision

In any event, we are committed to ensuring that the information we collect and use is appropriate for this purpose, and does not constitute an invasion of your privacy. We may pass your personal data on to Third Party service providers who are contracted to Core Financial Services Ltd in the course of dealing with you.

Our contractors are obliged to keep your details securely, and use them only to fulfil the service requested. Once your service need has been satisfied or the case has been closed, they will dispose of the details in line with our firm's procedures. If we wish to pass your sensitive personal data onto a third party we will only do so once we have obtained your consent, unless we are legally required to do so.

**How *Core Financial Services Ltd* uses your information**

Core Financial Services Ltd will process – that means collect, store and use – the information you provide in a manner that is compatible with the EU's General Data Protection Regulation (GDPR).

We will endeavor to keep your information accurate and up to date and not keep it for longer than is necessary. In some instances, the law sets the length of time information has to be kept, but in most cases, we will use its discretion to ensure that we do not keep records outside of our normal business requirements.

Our aim is not to be intrusive, and we undertake not to ask irrelevant or unnecessary questions. Moreover, the information you provide will be subject to rigorous measures and procedures to minimise the risk of unauthorised access or disclosure.

Reviewed and approved by:

Mark Sutton  
Data Protection Officer

Signed: .....

Date: 8/5/18.....