



Privacy Statement

Core Financial Services Ltd takes the privacy of personal data seriously - we therefore ask you to please read the following important information which explains how we collect, store and use your personal data. Our full Privacy Policy can be viewed via our website – www.coreifa.co.uk.

Core Financial Services Ltd is registered under the Data Protection Act (DPA) 1998. The General Data Protection Regulation (GDPR) has revised provisions of the DPA 1998, and as such our privacy policy reflects this.

1. Who are we?

Core Financial Services Ltd (Company No. 05428054) has its registered office at Kings Lodge, London Road, West Kingsdown, Sevenoaks, Kent TN15 6AR. Our phone number is 01622 692224 and the data protection email address is info@coreifa.co.uk.

2. What do we mean by Personal Data?

By personal data (or personal information), we mean information that relates to you and is used to identify you, either directly or in conjunction with other material we hold.

3. Why do we collect information from you?

We use your personal information for the following:

1. Provision of services and advice or to provide you with the information, products and services you have requested from us.
2. To comply with legislation in relation to anti money laundering regulation and the Financial Services Act.

4. How do we protect your personal information?

We have strict safeguarding processes to ensure that we meet our obligations under the Data Protection Act 1998.

5. What are your rights surrounding your personal information?

Your enhanced rights under the GDPR include:

1. The right of access – we will provide a copy of your personal data, free of charge and within 30 days of requests. Requests can be made in writing, by phone or by email.
2. The right to rectification – you may ask us to rectify any of your personal data which you believe is inaccurate or incomplete. We will respond within one month (this can be extended by two months where the request for rectification is complex). Requests can be made in writing, by phone or by email.
3. The right to erasure – you have the right to request ‘to be forgotten’, i.e. for us to delete all records of your personal data. We will comply with your request, unless we have a legal obligation to continue to hold your personal data (in which case we will inform you of the reason why we cannot delete the data).

6. Who do we share your personal information with?

We will only share your personal data with third parties when it is necessary for the service you have asked us to provide, and we will have contracts/safeguards in place to ensure that they comply with the GDPR and treat the privacy of your personal data with the same importance as we do.

Reviewed and approved by:

Mark Sutton

Data Protection Officer

Signed:  Date: 8/5/18