

Banks Wealth Management Ltd

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## Data Protection – Privacy Notice

We will collect and store your personal and financial information which will be handled in accordance with the Data Protection Act 1998 as amended, extended, re-enacted or consolidated from time to time (including without limitation the implementation of the General Data Protection Regulation 2016/679/EC) (data protection legislation). For the purposes of data protection legislation, we are the data controller and we will process your Data in accordance with articles 6 (1)(b), 6 (1)(c) and 9 (1)(a) of the General Data Protection Regulation 2016. We will use your information to ensure proper performance of our agreement with you and to comply with our legal obligations when providing the services as further described below.

We will use your name, address, email address, contact number, date of birth, national insurance number and financial information ('personal information') to provide our services to you and verify your identity and this may require us to pass your personal information to our group companies, electronic verification providers, product providers or other financial firms such as lenders, banks, insurers, fund managers and platform providers. Should you decide not to proceed with our services, we will delete your personal information.

We may be required to pass on your personal information to the Financial Conduct Authority (FCA), Financial Ombudsman Service (FOS) or the Financial Services Compensation Scheme (FSCS) to help with an investigation or complaint or other authorities as required by law.

We may need to collect sensitive personal data including information about your health, ethnic origin, or criminal prosecutions from third parties such as employers and credit reference agencies, fraud prevention agencies and other similar organisations in order to provide you with the services, for example where you require advice on protection or annuity products.

**If you consent to us obtaining your sensitive personal data from the third parties referred to above for the purpose of providing you with the services and sharing it with third party providers to obtain quotes on your behalf for example where we are providing you with Investment or mortgage advice as part of our services please insert an 'x' in this box**

You may exercise your right to withdraw your consent to the processing of your sensitive personal data at any time by contacting Stephen Danson at [stedanson@bankswealth.co.uk](mailto:stedanson@bankswealth.co.uk) or call 01254 830956.

If you would like to be contacted by us about other services we may offer from time to time, please tick below your preferred method of contact to confirm your consent:

In writing by post:  [mark X]

by email:  [mark X] by text:  [mark X] by phone:  [mark X]

Preferred date and time for contact by phone;

Weekday  [mark X] Weekend  [mark X] am  [mark X] pm  [mark X]

You may exercise your right to withdraw your consent and opt-out of receiving any marketing information from us at any time. To opt-out of receiving such information email [info@bankswealth.co.uk](mailto:info@bankswealth.co.uk) or call 01254 830956 providing us with your name and contact details.

For further information on how your personal information is used, including your rights to access the personal information, and who to contact if you have any queries, please see our Privacy Policy which is available on our website at [www.bankswealth.co.uk](http://www.bankswealth.co.uk) or by email [info@bankswealth.co.uk](mailto:info@bankswealth.co.uk)