



## Customer Privacy Notice

This Privacy Notice tells you what to expect us to do with your personal information when you make contact with us or use our services.

During the course of dealing with us, 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). 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 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 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 to provide you with the services, for example where you require advice on protection or annuity products.

Should you not 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 annuity or protection advice as part of our services please advise us by emailing [info@twigdenasset.co.uk](mailto:info@twigdenasset.co.uk)

Your privacy is important to us and we will keep your personal data secure in accordance with our legal responsibilities. We will take reasonable steps to safeguard your personal data against it being accessed unlawfully or maliciously by a third party.

If you have any questions or comments about this document, or wish to make contact in order to exercise any of your rights set out within it, please contact:

David Twigden – Compliance Officer

Registered Office: Prospect Place, 23 Osier Way, Olney MK46 5FP

Phone: 01234 270074

Email: [info@twigdenasset.co.uk](mailto:info@twigdenasset.co.uk)

If we feel we have a legal right not to deal with your request, or to action it in a different way to how you have requested, we will inform you of this at the time.

You should also make contact with us as soon as possible on you becoming aware of any unauthorised disclosure of your personal data, so that we may investigate and fulfil our own regulatory obligations.

If you have any concerns or complaints as to how we have handled Your Personal Data you may lodge a complaint with the UK's data protection regulator, the ICO, who can be contacted through their website at <https://ico.org.uk/global/contact-us/> or by writing to Information Commissioner's Office, Wycliffe House, Water Lane, Wilmslow, Cheshire, SK9 5AF. Telephone 0303 123 1113, email [casework@ico.org.uk](mailto:casework@ico.org.uk).