

Data Protection – Privacy Notice

As part of our General Data Protection Regulation (GDPR) obligations, we need to let you know about how your personal data is processed by us to perform our obligations and provide you with services we have agreed with you.

How information about you will be used

- We will collect and store personal information such as your name, address, email address, contact number, date of birth, national insurance number and financial information which will be used to provide you with the services you have requested from us and to comply with our contractual and legal obligations.
- 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.
- We may be required to pass your personal information to our employees, electronic verification providers, product providers, other financial firms such as insurers, fund managers and platform providers as well as other third parties such as providers of Information Technology and Compliance support services.
- 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.
- If we have not provided advice or a chargeable service to you, we will delete your personal information 12 months after our last contact, in line with our data retention policy.

Further Information

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 at <http://www.rosan-ifa.com/information/privacy.html> or by contacting our Privacy Officer, Kathryn Highett by email at kathryn@rosan-ifa.com or by phone on 01483 90 40 40.

You may exercise your right to withdraw your consent to the processing of your sensitive personal data at any time by contacting Kathryn Highett by email at kathryn@rosan-ifa.com or by phone 01483 90 40 40.

Consents

If you consent to us obtaining your sensitive personal data for the purpose of providing you with our services and sharing it with third party providers to obtain quotes on your behalf as part of our services and please tick this box:

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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.

I confirm that I am happy for RH to contact me by:

Post ☐

Email ☐

Text ☐

Phone ☐

I confirm that I am happy for RH to contact me:

AM PM

Monday to Friday ☐ ☐

Saturday to Sunday ☐ ☐

Opting out

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 you can email kathryn@rosan-ifa.com or call 01483 90 40 40.

Please print your name, sign and date:

Client name	
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Client signature	
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Date	
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