



The Old Bank
286 Oxford Road
Gomersal
Cleckheaton
BD19 4PY

Westfield Financial Solutions is an Appointed Representative of LWM10 Ltd., which is authorised and regulated by the Financial Conduct Authority (458204).

DATA PRIVACY NOTICE

WHY YOU SHOULD READ THIS DOCUMENT

To provide advice, we need you to share information with us. The information we collect is 'your personal data', which we will refer to as 'your data'. This document explains your rights and how we store, use, and share your data.

WHAT IS YOUR PERSONAL DATA

Your data is information that describes or relates to you. For example, your name or date of birth may identify you directly. Likewise, your employment or medical history might identify you indirectly. The information we request might include the following:

- Title and name
- Date of birth
- Gender
- Nationality
- Civil or marital status
- Contact details
- Addresses
- Employment
- Remuneration information
- Employment history
- Bank account details
- Tax information
- Loans and credit commitments
- Personal credit history
- Sources of income
- Expenditure
- Family circumstances
- Details of dependents
- Existing financial products
- Documents to verify your identity

HOW WE DEAL WITH YOUR DATA

When we provide advice, we enter into a contract with you. To perform that contract, we have the right to use your data as outlined in this document. Our right to use your data applies during initial discussions and after our contract ends. We have the right to use your data as long as it is in our legitimate business interests, assuming your rights are not affected. For example, we may need to:

- Liaise with product providers.

- Discuss advice with our compliance service provider.
- Use your data to comply with the Financial Conduct Authority.

SPECIAL DATA

We may need to ask about your special data. Your special data may include sensitive information such as:

- Ethnic origin.
- Health status.
- Medical history.
- Details of treatment.

We might discuss your special data with product providers.

Where you have parental responsibility for children under 13, we may also need to use their special data.

We might need you to disclose criminal convictions or offences. Insurers use 'Criminal Disclosures' to price policies and prevent fraud.

We will treat your special data and criminal disclosures like your data.

HOW WE COLLECT YOUR DATA

We collect your data from various sources, but mainly from you. We may also get information from third parties. For example:

- Your employer.
- Public data, such as the voter's roll.
- Credit agencies.

We will get your consent before we check your credit status and access your credit file.

We do not need your consent for identity checks, which may leave a soft footprint on your credit file.

HOW WE USE YOUR DATA

We will store your data in paper files, mobile devices, and computer systems. Computer systems include websites, emails, hard drives, and cloud storage. Only employees within our group can access your data to provide our service to you. We submit your data to product providers in paper form and through secure online portals to progress any applications.

SHARING YOUR DATA

We will share your data with the:

- Companies in our group.
- Advisers who introduce you to us.
- Financial Conduct Authority.
- Third parties who help us deliver our services.
- Third parties include compliance advisers, product specialists, estate agents and legal service providers.

We will only share data where we believe it is required and to deliver our service. Sharing your data does not entitle third parties to market to you. We do not envisage your data being transferred outside the European Economic Area.

DATA SECURITY AND RETENTION

Your privacy is important to us.

We will take reasonable steps to safeguard your data against unlawful attacks by third parties.

We also need you to take reasonable steps to protect your privacy when transferring information to us. For example:

- Please do not send confidential information over unprotected email.
- Make sure email attachments are password protected.
- Only use secure postage when sending original documentation to us.

We will keep your data for a minimum of six years. We will keep records indefinitely if we are legally required to do so.

YOUR RIGHTS

Concerning your data, you can:

- Request copies.
- Ask us to explain how we use it in more detail.
- Ask us to correct, delete, restrict, or stop using the data.
(We will provide details as to the extent we can comply with your request).
- Ask us to send electronic copies to another organisation.
- Change or withdraw marketing consent.

CONTACTING US

If you would like to discuss this document or exercise any of your rights, please contact:

The Data Protection Officer
LWM10 Ltd.

1 5 Mariner Court,
Wakefield
West Yorkshire
WF4 3FL

Tel: 03302 230 404

We will tell you if we have a legal right not to deal with, or act differently from any request you make. You should contact us if you become aware of any unauthorised disclosure of your data so that we may investigate and fulfil our obligations. If you have concerns or complaints about how we handle your data, you may complain to the data protection regulator, the ICO. You can contact the ICO through their website at:

<https://ico.org.uk/global/contact-us/>

Or in writing to:

Information Commissioner's Office
Wycliffe House
Water Lane
Wilmslow
Cheshire
SK9 5AF