

## PRIVACY NOTICE

This notice explains how Westbridge Pension Administration Limited use any personal information we collect about you

### What information do we collect?

We collect information about you when you engage us for professional services. This information will relate to your financial and personal circumstances. If necessary, we may also collect special categories of data such as information regarding your health, if this is needed.

We may also collect information when you provide feedback to us.

### Why do we need to collect your personal data and how do we use it?

The primary basis that we intend to use for the processing of your data is for the performance of our contract with you. The information we collect from you enables us to provide you with the services you require. We would be unable to carry out our services without collecting your personal data and would be unable to fulfil our legal and regulatory obligations.

### How long do we keep your information?

We should not keep your data for longer than is required under the terms of our contract with you.

We are however subject to regulatory requirements to retain data for specified minimum periods. We reserve the right to retain data for longer than this due to the possibility it may be required to defend a future claim against us.

You have the right to request deletion of your personal data. We will comply with this request subject to the restrictions of our regulatory obligations and legitimate interests as noted above.

### Can I access the information you hold about me?

You have a right to request a copy of the information that we hold about you. If you would like a copy of the information, we hold please write to us at the address noted below under the heading contact us

We have an obligation to ensure that your personal information is both up to date and correct. Please ask us to correct or remove any data you think is incorrect.

### Who might we share your information with?

In order to deliver our services to you we may send your details to companies we have chosen to support us in the delivery of the service we offer, such as those that we engage for professional compliance accountancy or legal services as well as product providers that we use to arrange financial products for you.

Where it is necessary for your personal data to be forwarded to a third party, we will use appropriate security measures to protect your personal data in transit in line with our data protection obligations.

### Marketing

If you have given us permission, we may email you about products or services that we think may be of interest to you. We will not share your information for marketing purposes with companies outside our group of companies.

Some of the things we send are core parts of the services we offer. If you have agreed to receive marketing information you may receive information about services or products, we think may interest you. You can opt out of receiving marketing information at any time. If you no longer wish to be contacted for marketing purposes, please let us know in writing or by email see the contact us section.

### Other websites

Our website may contain links to other websites. This privacy policy applies to this website only if you link to other websites you should read the privacy policy displayed on that website.

### Cookies

Cookies are text files placed on your computer to track the use of website activity they are designed to help us to develop and improve the client experience.

### Changes to our privacy policy

Our privacy policy is under regular review. Please check the website from time to time as the updated privacy policy will be uploaded to our website following amendment.

### What can you do if you are unhappy with how we process your personal data ?

If you are unhappy with how we process your data, please contact us.

You do have a right to lodge a complaint with the supervisory authority for data protection.

In the UK this is:

Information Commissioner's Office  
Wycliffe House  
Water Lane  
Wilmslow  
Cheshire  
SK9 5AF  
T 0303 123 113

### Contact us

If you have any questions regarding our privacy policy, please email us at [email@westbridgessas.co.uk](mailto:email@westbridgessas.co.uk)

or write to us at

Westbridge Pension Administration Limited  
8 New Street  
Leicester  
LE1 5NR