



## **Privacy Notice**

Nest Egg Life and Pensions Ltd t/a Nestegg Life and Pensions are committed to respecting and protecting your privacy and would like you to feel safe when you give us your personal details.

Our principal business is to provide advice and arrange transactions on behalf of clients in relation to Mortgages, Life, Pension and Investment products.

To provide you with relevant information, provide a financial services product, and respond to your requests, we will request that you provide us with information about yourself and the products/service you require.

This Privacy Notice will inform you of the information we gather and how it is used and for long for we maintain your data.

Nest Egg Life and Pensions Ltd t/a Nestegg Life and Pensions complies with EU General Data Protection Directive (GDPR) for the collection, use, and retention of all personal data.

### **Name and Contact Details of our firm**

Nest Egg Life and Pensions Ltd t/a Nestegg Life and Pensions, Pullamore, Cavan, H12 P403.

(T) 087 66272574

(E) [irene@nestegglifeandpensions.ie](mailto:irene@nestegglifeandpensions.ie)

### **Types and categories of personal data held**

We gather record and hold information on you in order to provide you with a product/service. Information required to provide you with a professional service and/or insurance product(s) will be recorded.

### **Use of the information we gather**

When we collect personal information about you, we tell you why we are asking for the information and what we intend to do with it. You will have the option of not providing the information, although in these instances, you may not be able to access certain products/services.

Our reason for processing your data under the GDPR is in order to be able to provide you with a retail financial product. We require the information from you in order to assist our firm to ascertain your actual needs/requirements.

### **Retention of your Personal Data**

Data will not be held for longer than is necessary for the purpose(s) for which they were obtained – upon lapsing or cancellation of a policy our company policy is to retain our client data for 7 years in order to fulfil our obligations under the Central Bank of Ireland's Consumer Protection Code 2012 and our obligations under the Criminal Justice (Money Laundering and Terrorist Financing) Act 2010.

