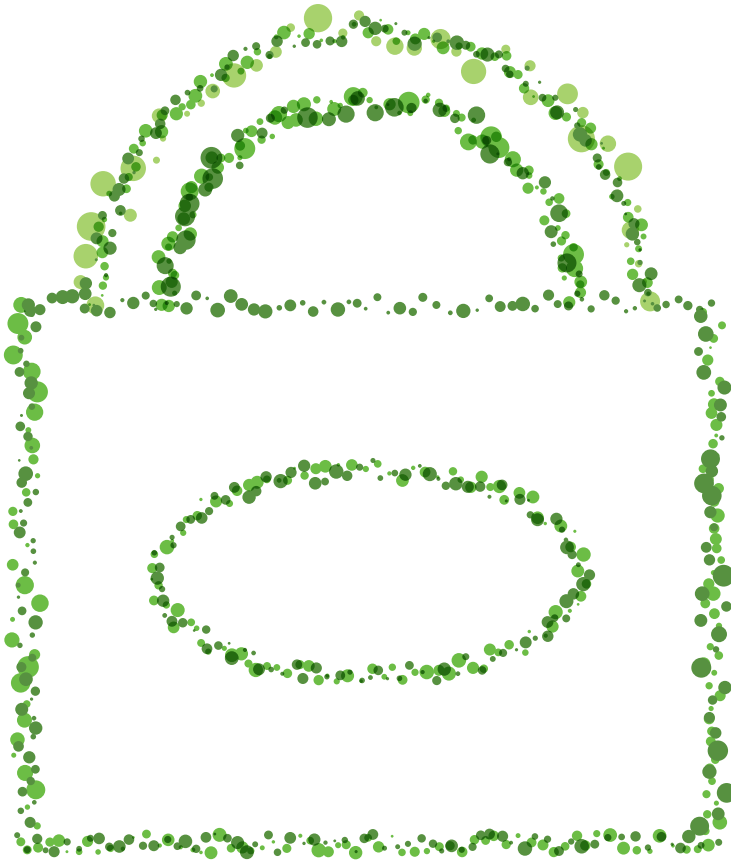




Data protection



Inspirational Financial Management Limited is part of the IFM Group of Companies. This privacy notice explains how we use any personal information we collect about you.

What data we collect & what do we do with it

In order to provide financial, insurance or mortgage advisory services for you, we will need to obtain some of your personal information concerning your finances, circumstances, objectives and other relevant details. We will collect, store and process this information. We will use it in order to provide you with the services you have requested.

Legal basis

We collect, control and process your personal information because this is necessary to provide you with information requested, answer any queries you may have and for the provision of our services to you. Contractual necessity is therefore the lawful basis for collecting, controlling and processing your personal details and those of your employees and service providers. Where we are advising on or arranging insurances, investment bonds, pensions or other insurance based products, we need to collect and potentially share special or sensitive personal data with providers.

Sensitive personal data:

- Racial or ethnic origin
- Political opinions
- Religious or philosophical beliefs
- Trade union membership
- Genetic data
- Biometric data
- Data concerning health
- Data concerning sex life or sexual orientation

We would discuss with you the need for the provision of sensitive data before you provide this information.

Sharing your data

In the course of our work with you we will share your personal data with product and service providers; we may also share you data with compliance monitoring & support organisations and regulatory bodies who are also 'Data Controllers' and registered with a supervisory authority in the EU unless otherwise indicated before we share any of your data

We also use external data processors that will hold information for the following purposes:

- Secure file sharing
- Data backup
- Dissemination of information
- Compliance monitoring
- Record keeping

Otherwise we will not share your personal information with other companies without your express authority except if our firm is sold or where we are required to do so by law. So, for example, if you require us to introduce you to another firm, we will pass your data to that firm for a specific purpose with your consent. We will do this once and you would need to consent again for us to repeat this.

Cross border transfer

Should any processor hold any data on our behalf outside of the EU we will take steps to ensure that it is held in a satisfactory jurisdiction. In the case of the US we will ensure that the EU-US Privacy Shield applies.

Marketing

The information we collect about you is used solely for the purposes for which it was provided. We will never use your data or share it for marketing purposes. Should we invite you to re-engage with us, this will either be as part of our contracted service, or on the basis of legitimate interests in a proportionate and relevant way.

Retention

We will keep your personal data throughout our business relationship. At the end of any contractual relationship we are required to continue to hold personal data under current legislation for varying periods and in some circumstances indefinitely. We may also consider it necessary to keep data beyond these timescales in order to defend any future legal action. Where we no longer need regular access to your data we may transfer your data to a secure archive in order to avoid any unnecessary processing.

Your rights

Under data protection law you have the right to ask us for a copy of the information we hold about you, and to have any inaccuracies corrected or removed. You may also ask us to delete or cease processing all personal data held by us or any processor with whom we have shared your data. We may not always be able to comply with a request for deletion, but you can ask us to cease processing your data.

In addition you have the right to be informed about the data we collect, where is located and with whom it is shared and the processing we undertake and to question any automated decision making processes.

To do this, or if you require more information please contact us, our contact details are below.

Complaints

The UK Information Commissioner's Office is our supervising authority where you can refer any complaints about data protection. You can find more information at ico.org.uk.

Contact

For any queries about data protection please contact The Data Protection Officer at Inspirational Financial Management Limited, Woodland View House, 675 Leeds Road, Huddersfield HD2 1YY.
