

Oak House A
Ransom Wood Business Park
Southwell Road West
Mansfield
Nottinghamshire
NG21 0HJ

01623 287 984
enquiries@charlesdeanuk.com

Your Data Protection Rights and Consent for use of Personal Data

Charles Dean Ltd will handle your information with the utmost confidentiality.

So that we may fully understand your circumstances and requirements, we will need to collect information about you, which we will hold as Data Controllers in accordance with the requirements of the Data Protection Act 1998 (DPA 1998) and the EU General Data Protection Regulation, together referred to as the 'Regulations'. We will use this information to analyse your current and future financial needs so that we can ensure that any subsequent advice is suitable to your circumstances. We will not release your information to any other party except as indicated in this consent or where required to do so by any statutory, governmental or regulatory body for legitimate purposes including, where relevant, to solicitors and/or other debt collection agencies for debt collection purposes.

The information you provide might also contain sensitive personal data as defined by the Regulations, being information as to your physical or mental health or condition; the committing or alleged committing of any offence by you; any proceedings for an offence committed or alleged to have been committed by you, including the outcome or sentence in such proceedings; your political opinions; religious or similar beliefs; sexual life; or your membership of a Trade Union.

By signing our confirmation of receipt, you agree that we can process, both manually and by electronic means, your personal data for the purposes of providing advice, administration and management in relation to your financial affairs. **You can withdraw your consent at any time by contacting us at the address shown above.**

"Processing" includes obtaining, recording or holding information or data. Processing is also likely to involve transferring some of your data to providers of financial products that we might recommend to you. These providers will be based in the UK and NI, the Channel Islands, the EU or the EEA. **We will confirm details of any such third-party recipients in writing to you when applicable and you will have the right to withhold consent to the transfer of data.**

To provide agreed services to you, it might be required to pass your personal information to parties located outside of the European Economic Area (EEA), in countries that do not have Data Protection Laws equivalent to those in the UK. Where this is the case we will take reasonable steps to ensure the privacy of your information and will obtain your explicit consent to do so.

Our regulator, the Financial Conduct Authority requires us to keep records of our business transactions for minimum periods of time depending on the transaction type. We will not keep records longer than is necessary.

Under the Regulations, you, or your appointed agent, have a right to inspect computer and certain manual records relating to yourself and your transactions, and where appropriate have them corrected or deleted. All such requests for information must be referred to the Data Protection Officer using the company contact details. As we treat all client records as confidential, we reserve the right to give you redacted copies of your records where releasing the original would compromise other clients' confidentiality.

The requested information will normally be provided free of charge. However, we reserve the right to make a charge to cover our administrative costs if the request is manifestly excessive or repetitive, or if you request further copies of information already provided under a subject access request.

www.charlesdeanuk.com

Registered Company Address.
Oak House A, Ransom Wood Business Park, Southwell Road West, Mansfield, Nottinghamshire, NG21 0HJ.

Registered in England & Wales. Registered Number 07880489.
Charles Dean Limited is authorised and regulated by the Financial Conduct Authority, FCA number 781330.