

# BARRY FLEMING & PARTNERS

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## General Data Protection Rules (GDPR) Notice

As you will probably be aware new rules designed to create a uniform level of data protection throughout the EU and accommodate the requirements of the digital era have recently been approved by the European Parliament. The reformed rules will replace the current data protection directive which dates back to 1995. They are also designed to give individuals more control over their own private information in the modern digitised world.

The General Data Protection Regulation will come into force on 25th May 2018.

In order us to provide or continue to provide on-going services and advice to you we would like you to review the declaration below and sign it.

Please note that further information is provided within the firm's privacy notice which can be found on our website, or a copy can be provided upon request.

### Protecting your personal information

- To provide our services properly we'll need to collect information about your personal and financial circumstances. We take your privacy seriously and will only use your personal information to deliver our services.
- Processing of your personal data is necessary for the performance of our contract for services with you. Generally, this is the lawful basis on which we intend to rely for the processing of your data. (Please see the reference to special categories of data below). Our policy is to gather and process only that personal data which is necessary for us to conduct our services appropriately with you.
- We adopt a transparent approach to the processing of your personal data. Sometimes, we may need to pass your personal information to other organisations. If you apply to take out a financial product or service, we'll need to pass certain personal details to the product or service provider.
- We may engage the services of third party providers of professional services in order to enhance the service we provide to you. These parties may also need to process your personal data in the performance of their contract with us. Your personal information may be transferred electronically (e.g. by email or over the internet) and we, or any relevant third party, may contact you in future by what we believe to be the most appropriate means of communication at the time (e.g. telephone/ email /letter etc.).
- The organisations to whom we may pass your details also have their own obligations to deal with your personal information appropriately. Sometimes a product or service may be administered from a country outside Europe. If this is the case, the firm must put a contract in place to ensure that your information is adequately protected.
- We will issue you with our Privacy Notice. This is a separate document which provides more information about the nature of our personal data processing activities and includes

details of our retention and deletion policies as well as your rights of access to the personal information that we hold on you.

- As part of this agreement we'll ask you to consent to the transfer of personal information in accordance with the protections outlined above.
- **Special categories of personal data:** there are certain categories of personal data that are sensitive by nature. The categories include: data revealing racial or ethnic origin, political opinions, religious or philosophical beliefs, trade union membership and data concerning health. Depending on the nature of the products and services that you engage us for we may need to obtain your sensitive personal data particularly in relation to health. Our policy is that should we require any special category of personal data we will only gather this with your explicit consent.
- If you are concerned about any aspect of our privacy arrangements, please speak to us.

## Your Consent

1. I understand and agree that your firm, as my financial advisers should have access to my personal data in order to administer my financial arrangements and provide me with the level of ongoing service that I wish to receive.
2. I specifically consent that your firm, as my financial advisers, may store, retain and use my personal data, provided to your firm in the past or in future, so as to provide me with those services.
3. I specifically consent that your firm, as my financial advisers, may store, retain and use any "sensitive" personal data (for instance information about my state of health) that I have provided to you to assist you to provide me with those services.