

# Privacy Notice for Advisers Interested in Joining Bankhall

## What is the purpose of this document?

Bankhall Support Services Limited ("Bankhall") is a "data controller". This means that we are responsible for deciding how we hold and use personal information about you. This Privacy Notice makes you aware of how and why your personal data will be used, namely for the purposes of matching you to prospective employers who are members of our network of financial advice firms. It provides you with certain information that must be provided under the General Data Protection Regulation (GDPR). You can contact us at Bankhall Support Services Limited, Jackson House, Sibson Road, SALE, M33 7RR.

## Data protection principles

We will comply with data protection law and principles, which means that your data will be:

- Used lawfully, fairly and in a transparent way.
- Collected only for valid purposes that we have clearly explained to you and not used in any way that is incompatible with those purposes.
- Relevant to the purposes we have told you about and limited only to those purposes.
- Accurate and kept up to date.
- Kept only as long as necessary for the purposes we have told you about.
- Kept securely.

## The kind of information we hold about you

In connection with marketing we may collect, store, and use the following categories of personal information about you:

- Your name, firm name, phone number(s), email address and general details about your firm.

## How is your personal information collected?

We collect personal information about you from third party companies that provide details about your firm from publicly available sources and also if you add your details to our enquiry website page.

## How we will use information about you

We will use the personal information we collect about you to contact you by email and telephone about Bankhall services.

## Situations in which we will use your personal information

We need the information in the list above primarily to enable us to contact you about joining Bankhall. We use your personal information to pursue our legitimate business interests ("Legitimate interests"), provided your interests and fundamental rights do not override those interests. The situations in which we will process your personal information are listed below.

Reason for processing	Lawful basis for processing	Recipients
To provide you with details of services from Bankhall which we think may be of interest to you. (see 'Marketing' below for further details).	Consent or Legitimate Interests depending on how we first made contact with you.	Sesame Bankhall Group Limited employees (Sesame Bankhall Group is our parent company).

## Marketing

You can opt out of receiving marketing at any time by clicking on the unsubscribe link on our emails or by contacting us by phone: 0345 300 5326 (option 2) or email: [business.solutions@bankhall.co.uk](mailto:business.solutions@bankhall.co.uk)

## Automated decision-making

You will not be subject to decisions that will have a significant impact on you based solely on automated decision-making.

## Data sharing

We will only share your personal information with Sesame Bankhall Group employees.

## Data security

We have put in place appropriate security measures to prevent your personal information from being accidentally lost, used or accessed in an unauthorised way, altered or disclosed. In addition, we limit access to your personal information to those employees, agents, contractors and other

third parties who have a business need-to-know. They will only process your personal information on our instructions and they are subject to a duty of confidentiality.

We have put in place procedures to deal with any suspected data security breach and will notify you and any applicable regulator of a suspected breach where we are legally required to do so.

#### **Data retention**

##### How long will you use my information for?

We will retain your personal information for a period of 3 months after the date of our email campaign so that we can contact you to follow up on our first contact. If you make an enquiry to Bankhall we will keep your data until we think that you are no longer interested in receiving services from Bankhall or you tell us that you are not interested but no longer than 2 years.

After these periods we will securely destroy your personal information in accordance with applicable laws and regulations.

#### **Rights of access, correction, erasure, and restriction**

##### Your rights in connection with personal information

Under certain circumstances, by law you have the right to:

- Request access to your personal information (commonly known as a "data subject access request"). This enables you to receive a copy of the personal information we hold about you and to check that we are lawfully processing it.
- Request correction of the personal information that we hold about you. This enables you to have any incomplete or inaccurate information we hold about you corrected.
- Request erasure of your personal information. This enables you to ask us to delete or remove personal information where there is no good reason for us continuing to process it. You also have the right to ask us to delete or remove your personal information where you have exercised your right to object to processing (see below).
- Object to processing of your personal information where we are relying on a legitimate interest (or those of a third party) and there is something about your particular situation which makes you want to object to processing on this ground. You also have the right to object where we are processing your personal information for direct marketing purposes.
- Request the restriction of processing of your personal information. This enables you to ask us to suspend the processing of personal information about you, for example if you want us to establish its accuracy or the reason for processing it.
- Request the transfer of your personal information to another party.

If you want to review, verify, correct or request erasure of your personal information, object to the processing of your personal data, or request that we transfer a copy of your personal information to another party, please contact the Data Protection Officer at [dataprivacy@sbg.co.uk](mailto:dataprivacy@sbg.co.uk).

#### **Data protection officer**

We have appointed a data protection officer (DPO) to oversee compliance with this privacy notice. If you have any questions about this privacy notice or how we handle your personal information, please contact the DPO at [dataprivacy@sbg.co.uk](mailto:dataprivacy@sbg.co.uk). You have the right to make a complaint at any time to the Information Commissioner's Office (ICO), the UK supervisory authority for data protection issues.