**Privacy and Consent Form**

Clark and Poole Limited are committed to complying with the General Data Protection Regulation and the Data Protection Act 2018. Looking after the personal information you share with us is very important, and we want you to be confident that your personal data is kept safely and securely and to understand how we use it to offer you a better and more personalised experience.

We have issued this notice to help you understand our Data Protection polies and for you to give your consent to Clark and Poole to process your personal data. Specifically this form will:

* Give an overview of the Clark and Poole Limited Privacy Notice which details the type of information that we will request and how it will be used.
* Inform you of your rights.
* Tell you where to find our detailed Privacy notice and Data Protection policies.
* Inform you who to contact in the event that you have questions or concerns relating to Data Protection or Privacy.
* Ask your consent to process certain personal data and to gain your consent to contact you in the future.

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| **HOW WE USE YOUR PERSONAL INFORMATION** |

We collect data about you and your family during our initial and other meetings with you. We will also collect data about you and your family from other people. We collect the data through note-taking and filling in of fact-finds and questionnaires about you and your family’s circumstances.

We may make checks with credit rating agencies to authenticate and verify your identity and credit status. We also make checks with organisations with whom you have policies of insurance and investments and with your mortgage provider. These checks are to help us with our legal obligations and to ensure that we provide you with advice that suits your circumstances. The scope and extent of the gathering of information from third parties depends on what type of service you are taking from us.

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| **HOW IS YOUR INFORMATION USED?** |

Primarily, we use your data and data about your family’s circumstances to provide financial advice to you and complete transactions on your behalf. We analyse and assess your data to maintain and develop our relationship with you.

Depending on the instructions we receive from you, we may pass your data to other professional advisers to enable us to provide advice most suited to your circumstances. Usually, this would be referrals to accountants, solicitors, tax advisers and sometimes to specialist advisers in the financial and insurance industry where you may benefit from the expertise of such third parties. We, and any third party specialist advisers to whom we introduce you, will pass your data to organisations when you agree to purchase or amend policies and products.

We will retain your data in accordance with law and regulation. We may be required to share your data with our regulator and other third parties including our auditors or insurers.

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| **YOUR RIGHT TO A COPY OF YOUR PERSONAL DATA** |  |

Under the Data Protection Act you have a right to obtain a copy of the personal information that we hold about you. If you believe that any information held is incorrect or incomplete, you should contact our Data Protection Officer, Natalie Addy, at natalie@clarkandpoole.co.uk. Any information that is found to be incorrect or incomplete will be amended promptly.

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| **YOUR CONSENT** |

In order to advise you correctly, Clark and Poole Ltd must obtain certain information from you about your financial and personal circumstances.

By providing us with your personal data:

1. You agree that the information we hold about you can be held on computer and/or paper files.
2. You agree that we may contact you for the purpose of review of your products or to advise you of new products that might be suited to you.
3. You agree that any information which you give us, including sensitive personal data such as health and medical records, may be disclosed to appropriate third parties for the purpose of processing your application.

We will not pass your personal data to any 3rd parties without your knowledge or consent. The circumstances when this may occur is in the event that you require third party specialist advisers such as those providing: legal, surveyor, investment or pensions advice in which case we would refer you to our preferred supplier with your consent.

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| **WHERE TO FIND OUR FULL PRIVACY NOTICE AND DATA PROTECTION NOTICES** |  |

For further information or to receive a copy of our detailed Privacy Notice and Data Protection policies. Please contact our Data Protection Officer, Natalie Addy, at [natalie@clarkandpoole.co.uk](mailto:natalie@clarkandpoole.co.uk).

Our policies are also accessible on our website: [www.clarkandpoole.co.uk/Privacy](http://www.clarkandpoole.co.uk/Privacy)