



Data Protection Policy

December 2016 Edition

BY USING OUR WEBSITE, REQUESTING OR SUBMITTING A CLAIMS PACK (IN WHOLE OR PART) OR USING OUR SERVICES AND GIVING YOUR INFORMATION TO US, YOU INDICATE YOUR CONSENT TO US USING PERSONAL INFORMATION ABOUT YOU AS DESCRIBED IN THIS DATA PROTECTION POLICY

THIS DATA PROTECTION POLICY EXPLAINS WHAT PERSONAL INFORMATION WE MAY COLLECT ABOUT YOU, HOW IT IS USED, AND WHAT WE DO TO KEEP IT SECURE. WE ALSO EXPLAIN YOUR RIGHTS IN RESPECT OF YOUR PERSONAL INFORMATION AND HOW TO CONTACT US SHOULD THIS BECOME NECESSARY.

The information we collect

In order to provide you with the products and services you require, we may collect personal information about you from our websites, telephone conversations, emails and written and verbal communications. This may include, for example, your name, address, email address, phone number and details of any services you request or which we provide to you or which are relevant to the service(s) in which you are interested. Occasionally we may ask for date of birth, for example, where the service you require has age related elements.

We may supplement the information that you provide with other information that we obtain as a result of our dealings with you, from others who act on your behalf or who have been involved in your financial affairs or relating to any claim you may wish to make (such as your financial advisers (including your IFA, or SIPP trustee) or the Financial Services Compensation Scheme) or which we receive from other organisations such as underwriters, regulators and legal advisers.

How we will use your information

All personal information that we obtain about you and/or any other person whose details you provide will be held, used, and protected by us in accordance with the latest data protection law, this Data Protection Policy and our Terms of Engagement. We will primarily use the personal information:

- for general administration (including verification, vetting and security checking)
- to administer your claim and any other products and services you request from us and any account you have with us (which will include tracing and collecting debts and fraud prevention)
- to communicate with you if there is a query or problem with your claim or our other services
- to obtain information from third parties who may have had some involvement in the your claim and those who may become involved in the claim
- to ensure appropriate documentation is prepared for your claim
- to notify you of our progress in respect of your claim

- for record keeping purposes
- to carry out market research so that we can improve the goods and services we offer
- for research purposes and to enable us to understand requirements and develop our services
- to create an individual profile for you so that we can respect your preferences.

With your permission, we will use the information we hold to inform you of products, services, events, newsletters and other information and opportunities that may be of interest to you.

Disclosing your personal information

If you make a claim using our services, we will have to provide a lot of the information we hold (and which relates to the claim) to those against whom the claim is to be made. Where they are no longer trading, this will be the Financial Services Compensation Scheme.

We may also have to provide certain information about you and your claim to underwriters, insurers, legal advisers or, where we agree to extend credit to you, to lenders. Where required to do so by law or by a regulator, we may provide some of your personal information to appropriate regulators.

Occasionally, we may need to appoint other organisations to carry out some activities on our behalf. These will include for example, enquiry agents, couriers and service providers that provide telephone call handling agents as well as technology hosts, printing companies and mailing houses. In these circumstances, we will ensure that personal information is properly protected and that it is only used in accordance with this Data Protection Policy.

Partners of Money and Me Claims

From time to time, Money and Me works with other selected organisations on a range of projects and they may be able to offer you products or services that may be of interest to you (**Money and Me Claims Partners**).

For an up-to-date list of Money and Me Claims Partners see our website (www.moneyandme.co.uk).

Invitations, newsletters, offers and opportunities

Money and Me, our Group Companies and our Partners would like to contact you and/or any person whose information you provide to us to invite you to enjoy other products and services in a number of ways, including by post, telephone, text message or by email.

Details of how to opt-in to or opt-out of receiving these invitations are in the Pension Plan Complaint Details form that you will complete and send to us, on relevant pages of our websites and/or in the electronic message you receive.

Subscribe / unsubscribe

You can change your mind about receiving details of other products and services at any time by using any of the methods shown below (see the section '**How to contact us**' below) or by following the instructions with each offer you receive.

Security

We take the security of personal information seriously. We have security procedures and technology in place to ensure that our paper and computer systems and databases are protected against unauthorised use, loss and damage.

Monitoring

We may monitor or record telephone calls and any live chats on our websites for security purposes and to improve the quality of the services we provide to you.

Use of your information outside of the European Union

Other than in the context of any products or services we provide on your instructions, we would not usually expect to transfer any of your personal information outside of the European Economic Area.

However, if we do transfer your personal information to other territories, we will take proper steps to ensure that the information is properly protected in accordance with this Data Protection Policy.

Changes to this Data Protection Policy

Privacy laws and practice are constantly developing and we aim to meet high professional standards. Our policies and procedures are, therefore, under continual review. We may, from time to time, update our security and privacy policies. We will send you a copy of our updated Data Protection Policy if it changes but you can always check our website periodically to see our latest policy.

Updating and correcting information

We encourage you to promptly update your personal information if it changes. If you delay, this could slow down any claim we are handling for you.

You can update or correct your personal information online in relevant client areas or by contacting us in writing or by email (see the section '**How to contact us**' below). Please include your name, address and/or email address when you contact us as this helps us to ensure that we accept amendments only from the correct person.

Your rights to access your personal information

You have the right to receive a copy of the personal data that Money and Me holds about you. We may charge a small fee towards the cost of administering any request made. The current fee is £10.00.

How to contact us

Email complianceofficer@moneyandme.co.uk

Mail Compliance Officer
Moneyandmeclaims Limited
11 Smitham Downs Road
Purley
CR8 4NH