

Continuum Wealth Limited

Protecting your Personal Information (Privacy Statement)

- To advise you properly we'll need to collect information about your personal and financial circumstances. The lawful basis on which we may do this is both to fulfil our contract with you and that it is in your legitimate interest for us to do so. If you choose not to share some or all of the information we request, that will impair our ability to give suitable advice. We take your privacy seriously and will only use your personal information to deliver our services. We have designed our procedures to ensure we are in line with the requirements of the Data Protection Act and the General Data Protection Regulations.
- Sometimes, we may need to pass your personal information to other organisations (e.g. 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 also have to share information with Regulators, Ombudsmen or other authorities and with IT providers who help us manage your data. 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.
- As part of this agreement we'll ask you to consent to the transfer of personal information in accordance with the protections outlined above. We will ask you specifically to consent to us holding special category data (sensitive personal information such as biometrics (where used for ID purposes), health, sex life or sexual orientation, these last two only at the request of potential insurers. We will also give you the opportunity to opt-in to marketing activity.
- Where you have given consent, you are free to withdraw it at any time and you can ask for data to be deleted. However, we need to point out that we are required by our regulator to hold some information for minimum periods, in some cases indefinitely including records that may be required in the event of a complaint.
- You are entitled to ask for a copy of the data we hold (known as a Subject Access Request). We will provide this to you within 30 days of the request and there is no charge for providing the information.
- You also have the following rights. If you wish to exercise any of them, please contact us.
 - The right to ask us to rectify any errors in the data we hold
 - The right to restrict processing – provide it does not conflict with our regulatory requirements
 - The right to transfer your data to someone else
 - The right not to be subject to automatic decision making including profiling
- If you're concerned about any aspect of our privacy arrangements please speak to us.