



# Thomas Grant & Company Ltd

## Privacy Notice

General Data Protection Regulation (GDPR) came into effect on the 25<sup>th</sup> May 2018. The new regulation is focused on you the individual and how your data is used and processed. As a client of Thomas Grant and Company Limited it is important that we let you know of the rights you have under GDPR, this document does that.

This General Data Protection Policy sets out the basis on which any personal data we collect from you, or that you provide to us, will be processed by us. When you use the services of Thomas Grant and Company Limited we must collect information about you which constitutes personal data under General Data Protection Regulation (GDPR). Please read the following carefully to understand our views and practices regarding your personal data and how we will treat it. By using our services you are accepting and consenting to the practices described in this notice.

### Information about us

Thomas Grant & Company Limited is registered in England and Wales, Registration number 2788515. We are authorised and regulated by the Financial Conduct Authority registration number 163296.

### Information we may collect from you

We may collect and process the following data about you:

- You may give us information about you by filling in forms or by corresponding with us by phone, email, in writing or otherwise. This includes but is not limited to information you provide when you open an account, request quotations, register for email alerts, request literature, sign-up for newsletters or enter a competition, promotion or survey. The information you give us may include your name, address, email address and other contact information, financial and debit card information as well as other personal information.
- We may receive information about you from third party service providers such as credit reference agencies. We may combine this information with information you give to us and information we collect about you. We may use this information and the combined information for the purposes set out in this General Data Protection Policy (depending on the types of information we receive).

### How GDPR protects you

Data protection law says that we are allowed to use personal information only if we have a proper reason to do so, we must have one of the following reasons:

- To fulfil a contract we have with you
- When it is our legal duty
- When it is in our legitimate interest
- When you consent to it

## Uses made of the information obtained

We may use information held about you in the following ways:

- to provide you with any services and/or information you request from us (which includes carrying out any obligations arising from any contracts entered into between you and us);
- to notify you about changes to our service;
- to provide you with information by post, email, telephone or otherwise about corporate actions, products and services of a similar nature to those you have previously purchased or expressed an interest in which are offered by us and which we think may be of interest to you. You have the right to ask us not to process your personal data for marketing purposes. You can exercise your right to prevent such processing by contacting us by phone, post or email.
- to administer our sites and for internal operations, including troubleshooting, data analysis, load management, testing, research, statistical and survey purposes;
- to improve our sites to ensure that content is presented in the most effective manner for you and for your computer or other device;
- to measure or understand the effectiveness of content we serve to you and others, and to deliver relevant content to you;
- to obtain your feedback on a product, service or our sites via a third party appointed by us;
- to allow you to participate in interactive features of our sites, when you choose to do so; and
- as part of our efforts to keep our sites safe and secure and to prevent and detect money laundering, financial crime and other crime
- to meet our legal obligations

## Disclosure of your information

We will never sell, trade, or rent your personal information to others however; we may share your information with selected third parties including:

- our partners, suppliers and sub-contractors for the performance of any contract we enter into with them or you, or to enforce or apply our statutory disclosures or any other agreement or to protect the rights, property or safety of our sites, our users or others;
- governmental or judicial bodies or agencies to comply with our legal and regulatory obligations;
- fraud prevention agencies, other companies and organisations to prevent or detect financial and other crime;
- data, service and software providers that assist us in the improvement and optimisation of our sites and services.

## Retaining your personal information

We will retain your personal information for as long as it is necessary for the purposes described above. Typically we will retain your data for a minimum of seven years for business purposes and to comply with legal and regulatory requirements or for any legal claims.

## Where we store your personal information

We store your data on our secure servers in the United Kingdom and retain it for a reasonable period or as long as the law requires. However, your data may be transferred to, stored at, and processed at a destination inside or outside the European Economic Area by our service providers. By submitting your personal information, you agree to this transfer, storing or processing. We will take all steps reasonably necessary to ensure that your data is treated securely and in accordance with this General Data Protection Policy.

## **Safeguarding your personal information**

We endeavour to protect your personal information at all times and we take all reasonable precautions to keep your personal information secure, including safeguards against unauthorised access, use or data loss.

We have a backup and disaster recovery plan in place which gives us the ability to restore the availability and access to your personal data in a timely manner in the event of a physical or technical incident.

## **Telephone calls**

When you call any of the client telephone numbers we will collect the Identification information of the call and retain a copy of the telephone call for our training and security processes. We will also use the information to help improve our efficiency and effectiveness.

## **Your rights**

You have the right to request a copy of the personal information we hold about you. If you would like a copy of some or all of this information you may contact us by telephone or you may write to us at our registered office address below. We may charge a nominal fee for providing this information.

If you believe that any of the information we hold is inaccurate, incorrect or incomplete please contact us as soon as possible so we can update it.

You can ask us to delete the personal information we hold about you when it is no longer required for a legitimate business need, legal or regulatory obligations or for the purposes it was collected for.

At any time, you may withdraw the consent you granted for your personal information to be used for marketing purposes. If you withdraw your consent, it will not affect the lawfulness of any past activities we have undertaken based on the previous consent.

We reserve the right to revise or supplement this Data Protection Policy from time to time, the latest version can be found on our website [www.thomasgrant.co.uk](http://www.thomasgrant.co.uk)

If you have any questions or concerns about our use of your personal data, please contact us in writing to Thomas Grant & Company Limited, 40a Friar Lane, Leicester, LE1 5RA or by email to [info@thomasgrant.co.uk](mailto:info@thomasgrant.co.uk) or by telephone on 0116 225 5500