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Privacy Notice – Clients and potential clients

Who are we?

For the purposes of the General Data Protection Regulations, The Investment Coach Limited is a data controller and data processor.

The information we will collect from you

We will collect a range of personal data including: your name, address, telephone numbers, email addresses, National Insurance numbers, contract numbers, employment and tax data, etc. We will also hold “sensitive” personal data, including: medical and mental health, philosophical beliefs, ethnic origin and biometric data (e.g. photo in an electronic passport).

How will we use your information?

This data will be stored on our case management system or internal intranet and we will contact you for the purposes of providing you with legal updates or to enable us to contact you if we are in need of your expert opinion, advice or services.

Who do we share this information with?

If during the course of our contact we have to transfer your personal data outside of the EEA we will take steps to ensure that your data is given the fullest of protection at the time that it is sent.

If you have agreed to receive marketing information from us we will use a programme called MailChimp. This company is based in the USA but we would like to reassure you that your data will be afforded the same level of security as if it were held in the UK, under a scheme known as the Privacy Shield.

The same applies to other back-office and business critical systems we use, the key ones being: Google, Microsoft, Trello and Dropbox (trademarks acknowledged).

How long will your information be kept?

Your information will be stored on our database whilst there is a legitimate business interest and this could be for an indefinite period, in some cases, as required by law and/or regulation. However, you can ask for data to be removed at any stage, which we will do promptly, providing there are no overriding legal or regulatory requirements to hold the data.

If you have agreed to receive our marketing, then that data will also be held on our file indefinitely.

However, you can at any time ask to be removed from the list by pressing the unsubscribe button on our emails.

What rights do you have?

You have a series of rights under the GDPR, these are:

- Right of access and rectification
- Right to erasure or “right to be forgotten”
- Right to restriction
- Right to data portability

If you require any further information about any of these rights, please review the information at the website of the Information Commissioners Office www.ico.org.uk

Other

Further information can be found in our Client Agreement or “Terms” (website Privacy Notice) and “Cookie” policy found as links at the bottom of our website: www.TheInvestmentCoach.co.uk

Complaints

If you have any complaints about your data security, then please contact our Data Protection Supervisor, Andrew Reeves. He is a director in the firm and can be contacted at:

andrew@theinvestmentcoach.co.uk or on 01933 315698. If, however, you believe your complaint remains unresolved then you can contact the Information Commissioners Office, whose details are available at www.ico.org.uk