



Privacy Statement

MacKenzie Webb Associates Ltd

The Office, 17 Mary Vale, Godalming, Surrey, GU7 1SW

At MWA we take your privacy seriously and will only use your personal information to provide regulatory support and to provide the services you have requested from us. This privacy statement explains the rights you have in relation to your personal data, the reasons for processing your personal data and how we use that data.

YOUR RIGHTS

You have the right to know:

- Why we process your personal data
- What personal data we hold and from where it is obtained
- With whom your personal data may be shared
- For how long we will hold your personal data
- Your rights to rectification, restriction of processing and erasure of your personal data
- Your right to complain to the Information Commissioner's Office

REASONS FOR PROCESSING YOUR PERSONAL DATA

We process your data for the purposes of our legitimate interest so that we can provide you with financial advice, investment management and arrange financial transactions.

REASONS FOR HOLDING YOUR PERSONAL DATA AND WHERE WE GET IT FROM

We collect data about your personal and financial circumstances. Most of this data has been provided by you directly. However, we may obtain information which is not publicly available from financial institutions and other third parties. We may need to collect additional information or use information that we already hold for further advice or transactions.

We will collect what is deemed to be special category data relating to your health as this will affect our advice and is required for insurance or annuity contracts.

REASONS YOUR PERSONAL DATA MAY BE SHARED

We share your personal data with firms with which we arrange financial transactions for you. We may also share your personal data with other companies such as accountants, auditors, lawyers, global tax authorities including HMRC, compliance consultants and any organisation which requires regulatory access, or which is responding to legal process.

HOW LONG YOUR PERSONAL DATA WILL BE HELD

We retain our client data records for as long as is required by our regulators and if the data may be needed to defend a legal claim.

YOUR RIGHTS OVER THE DATA WE HOLD

You have the right to ask:

- To see your personal data and we will provide you with a copy
- That we update or correct your personal data
- That we restrict the processing of your personal data
- Us to delete your personal data once we no longer need to process it in accordance with our legal obligations, or need it to defend a legal claim
- That we stop sending you product information both now and in the future. Any such withdrawal of consent will not prevent us from sending you information about your financial matters which are within the scope of our client agreement. This will continue until that agreement has been terminated.

QUESTIONS REGARDING THIS PRIVACY STATEMENT

If you have any questions about this statement, please contact Bill Webb at the address below.

COMPLAINTS PROCEDURE

You have the right to complain to the Information Commissioner’s Office (ICO), which is the body that regulates the handling of personal data in the United Kingdom.

You can do this as follows:

- Online, through the ICO’s website at <https://ico.org.uk/concerns/handling/>
- E-mail, to registration@ico.org.uk
- Telephone, on 0303 123 1113
- Post, to the Information Commissioner’s Office, Wycliffe House, Water Lane, Wilmslow, SK9 5AF.

From time to time we would like to contact you with details of other products, services or any other offers that we think may be of interest to you. If you consent to us contacting you for this purpose, please detail below how you would like us to contact you. Please would you also check that the contact details we hold are correct, note any amendments that we need to make, and return the form in the envelope provided. Please be advised that we will not pass your details to other companies for any form of direct marketing.

POST: YES / NO

ADDRESS:
.....

EMAIL: YES / NO

EMAIL ADDRESS:

TELEPHONE: YES / NO

HOME:

MOBILE:

WORK:

TEXT: YES / NO

SIGNED: _____

PRINT NAME: _____

DATE: _____

