

Bankhall Data Privacy Notice

Advisors Interested in joining Bankhall

1. What is the purpose of this document?

This privacy notice describes how Bankhall collects and uses personal information about you during and after your working relationship with Bankhall, in accordance with the Data Protection Act 2018, also known as the UK General Data Protection Regulation (GDPR).

Bankhall is a "data controller". This means that Bankhall is responsible for deciding how information about you is held and used, this includes the use of any data processors or sub-processors. Bankhall is required under data protection legislation to notify you of the information contained in this privacy notice.

This Privacy Notice makes you aware of how and why your personal data will be used, namely for the purposes of matching you to prospective businesses and partners who are members of our network of financial advice firms for the provision of financial advice and services.

When we mention "Bankhall", "we", "us" or "our" we are referring to Bankhall Support Services Limited

You can contact the Data Protection Officer (DPO) on dataprivacy@sbg.co.uk, or at Bankhall Support Services Ltd, Fourth Floor, Jackson House, Sibson Rd, Sale M33 7RR.

Bankhall ensures it upholds the highest standards of data protection principles and adheres to the following standards across the business. Data will be:

- Used lawfully, fairly and in a transparent way.
- Collected only for valid purposes that we have clearly explained to you and not used in any way that is incompatible with those purposes.
- Relevant to the purposes we have told you about and limited only to those purposes.
- Accurate and kept up to date.
- Kept only as long as necessary for the purposes we have told you about.
- Kept securely.

Further information is detailed in our Data Protection Policy and reviewed annually or when any major changes are required.

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2. What information is collected and how?

We collect personal information about you, from information you provide and from third party companies that provide details about your firm from publicly available sources and also if you add your details to our enquiry website page.

These will initially only be contact details but we will need to collect more information if you decide to proceed with Bankhall services. When you proceed with Bankhall services, your privacy terms will move in line with a separate agreement, and the existing client privacy policy.

3. Why and how will your information be processed?

Bankhall processes your personal data in order to provide you details of services from Bankhall which we think maybe of interest to you. This includes marketing and promotions about current and new services.

2.1 Lawful reason for processing

The lawful basis for processing your data, under Article 6(1) of the UK GDPR is 'Consent' and 'Legitimate Interest', this is depending on the services provided to you and how your data was collected.

All lawful basis for processing are considered against every service to ensure they are in line with legal requirements and your rights.

2.2 How will your information be used?

We will use the personal information we collect about you to contact you by email and telephone about Bankhall services.

You can opt out of receiving marketing at any time by clicking on the unsubscribe link on our emails or by contacting us by phone: 0345 300 5326 (option 2) or email: business.solutions@bankhall.co.uk
We will not use your information for any automated decision making that will have any impact on your rights and freedoms.

4. What information is held about you?

In connection with marketing we may collect, store, and use the following categories of personal information about you:

- Your name, firm name, phone number(s), email address and general details about your firm.

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5. How long is your data kept?

We will retain your personal information for a period of 3 months after the date of our email campaign so that we can contact you to follow up on our first contact. If you make an enquiry to Bankhall we will keep your data until we think that you are no longer interested in receiving services from Bankhall or you tell us that you are not interested but no longer than 2 years

After these periods we will securely destroy your personal information in accordance with applicable laws and regulations.

6. Who is your data shared your data with?

We will only share your data with Bankhall support services staff and may share with the wider Sesame Bankhall Group employees, depending on the services you have shown interest in.

7. What are your rights?

Under UK GDPR, you have the following rights:

- **Right to be Informed** – You have the right to be informed about the collection and use of your personal data
- **Right of Access** – You have the right to access and receive a copy of your personal data and other supplementary information
- **Right to Rectification** – You have the right to have inaccurate personal data rectified, or completed if it is incomplete
- **Right to Erasure** – You have the right to have personal data erased
- **Right to restrict processing** – You have the right to restriction or suppression of personal data
- **Right to data portability** – You can request a copy of data and/or to reuse this data for your own purposes across different services
- **Rights relating to automated decision making including profiling** – You have specific rights when automated decisions are made about you or you are profiled as part of a service. More information on this right can be sought through the group DPO.

To exercise these rights, contact Bankhall using the details provided in para 1. We will respond within 1 calendar month unless the request is particularly complex and then an extension with a maximum time of 3 calendar months, may be requested.

8. How we protect your data

Bankhall consider security and the required technical and organisational measures required to comply with Article 5(1) of the UK GDPR meaning that it will ensure personal data is processed in a manner that ensures appropriate security of the personal data, including protection against unauthorised or unlawful processing and against accidental loss, destruction or damage, using appropriate technical or organisational measures.

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The business has an extensive cyber and information security framework and associate policies that ensure the technical and organisational measures are always kept up to date. This includes that of our suppliers and their responsibilities as processors and sub-processors.

9. Updates to this notice

We reserve the right to update this privacy notice at any time, and we will provide you with a new privacy notice when we make any substantial updates. We may also notify you in other ways from time to time about the processing of your personal information.

10. Complaints

Any complaints or concerns can be reported in the first instance to the SBG DPO on dataprivacy@sbg.co.uk or by visiting the Bankhall website and using the contact details or feedback form there – www.sbg.co.uk.

If you are not happy with the way Bankhall deal with any complaints or have any further concerns or complaints, you have the right to lodge a complaint with the UK's data protection regulator, the Information Commissioners Office (ICO), who can be contacted through their website at <https://ico.org.uk/global/contact-us/> or by writing to:

Information Commissioner's Office
Wycliffe House
Water Lane
Wilmslow,
Cheshire
SK9 5AF

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