Data Consent Agreement

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This agreement is issued on behalf of Truly Independent Ltd

TRULY INDEPENDENT
Financial Advice for Everyone

Data Protection

The information you have provided is subject to the General Data Protection Regulation (Regulation (EU) 2016/679). (GDPR)

By signing this document, you consent to us or any company associated with us, for example, product providers or platforms we use to provide you with our services, processing your personal data, both manually and by electronic means.

Your data will be used for the sole purpose of providing financial advice, administration and management.

"Processing" includes obtaining, recording or holding information or data, transferring it to other companies associated with us, such as product providers, the FCA or any other statutory, governmental or regulatory body for legitimate purposes including, where relevant, to solicitors and/or other debt collection agencies for debt collection purposes and carrying out operations on the information data.

In order to provide services to you we may be required to pass your personal information to parties located outside of the European Economic Area (EEA) in countries that do not have Data Protection Laws equivalent to those in the UK. Where this is the case we will take reasonable steps to ensure the privacy of your information.

The information provided may also contain sensitive personal data for the purposes of the Act, including information that relates to your physical or mental health or condition; the committing or alleged committing of any offence by you; any proceedings for an offence committed or alleged to have been committed by you, including the outcome or sentence in such proceedings.

If at any time, should you wish to withdraw consent, for us or any other company associated with us, to process your personal data or sensitive personal information, please contact our Data Protection Officer at info@trulyonline.co.uk, or in writing at: Truly Independent, Atlantic House, Parkhouse, Carlisle, CA3 0LJ.

You may be assured that we and any company associated with us will treat all personal data and sensitive personal information as confidential, and will not process it other than for a legitimate purpose associated with the service we will provide to you. Steps will be taken to ensure that the information is accurate, kept up to date and not kept for longer than is necessary.

If we provide you with financial advice, your data will be kept in accordance with FCA regulatory expectations, which in some cases means the duration could be indefinite.

Measures will also be taken to safeguard against unauthorised or unlawful processing and accidental loss, destruction or damage to the data.

Subject to certain exceptions, you are entitled to have access to your personal and sensitive personal data that is held by us.

You will not be charged for us supplying you with such data, however we do reserve the right to apply a 'reasonable fee' where requests are deemed excessive.

We will respond to your request as soon as possible and within a maximum time frame of one month.

Data Processing

We will ensure that we are accountable and are able to demonstrate that data processing only occurs within the following principles:

1. Your data will be lawfully and fairly processed in a transparent manner.
2. Your data is collected on the grounds of explicit and legitimate purposes only.
3. We will only ask for your data when necessary, explain if your data will be shared and how long it will be kept for.
4. Your data will be accurate, kept up to date and erased, without delay, should your data no longer be required for the purposes to be processed.
5. Your data will only be retained for as long as is necessary.
6. Your data will be secure.

Rights of the Client

The points below clearly set out the rights each client is entitled to. Please ask us for an explanation of each, should you wish to have more information:

1. The right to be informed
2. The right of access
3. The right to rectification
4. The right to erasure
5. The right to restrict processing
6. The right to data portability
7. The right to object
8. Rights to automated decision and profiling

Right to Complain

In rare occasions where you believe your data has been wrongfully processed, stored or handled, you have the right to raise a concern with the Information Commissioner's Office (ICO).

Details on how to do this can be found here: https://ico.org.uk/for-the-public-raising-concerns/

Communication and Marketing Preferences

Occasionally, we may send you marketing/promotional communications via email, telephone, SMS or the post. Recipients will be carefully selected, and information will only be sent where we feel it to be appropriate.

Please indicate YES or NO in the box below:

I wish to opt IN to receiving communications or marketing material	YES	☐	NO	☐

If you consent to Truly Independent Ltd contacting you for this purpose please tick to say how you would like us to contact you (you may select more than one):

☐ Post

☐ Email

☐ Text Message (SMS)

☐ Telephone

I hereby give consent to Truly Independent Ltd for my personal data to be processed in accordance with the General Data Protection Regulations (GDPR) and in relation to the purposes described in this document.

Client Name: .....

Signature: .....

Date: .....

Client Name: .....

Signature: .....

Date: .....