



Söderberg
& Partners

Wealth
Management

Privacy Policy

Our Contact Details

Söderberg & Partners Wealth Management
One Temple Quay, Temple Back East, BRISTOL, BS1 6DZ
+44 117 463 5100
servicecentre@soderbergpartners.com

The type of information we collect

We currently collect and process any and all of the following information depending on the services required:

- Personal identifiers, contacts, and characteristics (for example name and contact details)
- Financial data, including bank account details, tax status, income and investments held.
- Employer data, including name and address of employer.

How we get the personal information and why we have it

Most of the personal data we process is provided by you to us directly for the fulfilment of an investment services contract with you. We also receive personal information indirectly, from a professionally selected partner who will establish if you are a politically exposed person or appear on any UK HMRC sanction list. We share this information with Seccl Technology Ltd, our chosen technology partner and provider of the systems delivering the platform services you have signed up for.

Under the UK General Data Protection Regulation (UK GDPR), the lawful basis we rely on for processing this information are:

- (a) Your consent. You are able to remove your consent at any time. You can do this by contacting Söderberg & Partners Wealth Management on servicecentre@soderbergpartners.com
- (b) We have a contractual obligation.
- (c) We have a legal obligation.

How we store your personal information

Your information is securely stored. We keep your personal information (as described above) for seven years following the end of our relationship with you. We will then dispose of your information by destruction of any durable media or putting beyond use any electronic media. Note: In certain circumstances information relating to your pension is required by UK law to be kept indefinitely and unstructured data such as e-mails will be deleted on a rolling 7-year basis.

Your data protection rights

Under data protection law, you have rights including:

- Your right of access - You have the right to ask us for copies of your personal information.
- Your right to rectification - You have the right to ask us to rectify personal information you think is inaccurate. You also have the right to ask us to complete information you think is incomplete.

- Your right to erasure - You have the right to ask us to erase your personal information in certain circumstances.
- Your right to restriction of processing - You have the right to ask us to restrict the processing of your personal information in certain circumstances.
- Your right to object to processing - You have the the right to object to the processing of your personal information in certain circumstances.
- Your right to data portability - You have the right to ask that we transfer the personal information you gave us to another organisation, or to you, in certain circumstances.
- You are not required to pay any charge for exercising your rights. If you make a request, we have one month to respond to you.

if you wish to make a request, please contact us at
Söderberg & Partners Wealth Management
One Temple Quay, Temple Back East, BRISTOL, BS1 6DZ
+44 117 463 5100
servicecentre@soderbergpartners.com

How to complain

If you have any concerns about our use of your personal information, you can make a complaint to us at servicecentre@soderbergpartners.com

You can also complain to the ICO if you are unhappy with how we have used your data.

The ICO's address:

Information Commissioner's Office

Wycliffe House

Water Lane

Wilmslow

Cheshire

SK9 5AF

Helpline number: 0303 123 1113 ICO website: <https://www.ico.org.uk>