



BESPOKE

## Data privacy notice for clients and brokers

Bespoke Trustees Limited and Bespoke Investments Limited offer a range of pension and investment products to clients through their appointed Financial Broker.

We receive personal data from clients and brokers via application forms for our products. Clients and other parties may also provide us with additional personal data as required during our relationship in order to fulfil our contractual obligations with clients and brokers.

We may be required to obtain sensitive information, in particular health information. Such data will only be processed where this is a requirement in order to provide our services to you or in order to fulfil our legal obligations.

We use personal data in order to fulfil our contractual obligations with clients and brokers and to comply with our legal and regulatory obligations.

When necessary in order to provide contracted services to clients and brokers, we share personal data with third parties on a confidential basis. We share personal data with statutory and regulatory bodies as required to fulfil our legal obligations.

It is our aim to retain any information which we hold within the EEA. However, given the nature of our business relationships with certain product providers, such providers may have legitimate business reasons to transfer information to countries outside the EEA. Some of these jurisdictions offer differing levels of protection of personal information, not all of which may be as high as Ireland.

Under data protection legislation you have the right to request a copy of all your personal data held by us, rectify such data, request the restriction of processing the data, object to the processing of the data, request that data be erased, or have any inaccuracies in your personal data corrected. You may also request that we transmit your personal data to another data controller, where this is technical feasible.

You can exercise these rights by contacting the Head of Risk and Compliance, 16 Roden Place, Dundalk, Co. Louth A91 N9CV, including Bespoke Trustees Limited or Bespoke Investments Limited as applicable.

We are obliged to hold your data for six years from the end of the client relationship. We retain data for no longer than is necessary and review our records on an annual basis.

Your personal data will not be subject to automated decision making.

If you have a concern about our handling of your data you have the right to complain to the Data Protection Commissioner at Canal House, Station Road, Portarlington, R32 AP23, Co Laois.

Website: [www.dataprotection.ie](http://www.dataprotection.ie).

**Website information:** You do not need to register your personal information in order to use our website. You may submit personal information by filling out the 'Contact us' form, clicking the email link or by entering your email address into the contact us field.

If you submit personal information to the website, the information will be used for the purposes you requested. The information may be stored and maintained. We will use your personal data only for the purpose for which it was collected, unless we obtain your specific consent to other uses, or unless otherwise required or permitted by law.

It is our policy to limit the information collected to only the minimum information required to complete a website visitor's request.

We do not intend to seek any special categories of data through our website.

The time periods for which we retain your information depends on the type of information and the purposes for which we use it. We will keep your information for no longer than is required to fulfil our contractual obligation to you or to comply with statutory requirements.

By using our website and submitting information to us you are agreeing to the collection and use of your information as described in this Privacy Notice.