

Privacy Policy

Slipaczek Chartered Financial Planners

At Slipaczek Chartered Financial Planners privacy is paramount for our clients and any other contacts that we engage or work with.

Our privacy policy contains information regarding personal details that are collected, the information obtained, why and who it may be shared with and the rights our clients have to personal information that has been obtained.

New regulations have been introduced in May 2018 being the General Data Protection Regulation or commonly known as GDPR.

From time to time we will update our privacy policy, please ensure you regularly check and how this may impact your personal information.

Who we are:

We are "Filip Slipaczek B.A. (Hons) FCIB ACII FPFs Chartered Financial Planner ISO 22222 Certified"

Trading as: "Slipaczek Chartered Financial Planners"

Contact us:

Should you have any questions or comments regarding our use of personal data please contact: enquiries@slipaczek.pro, Telephone: 020 8449 1755 or write to us at:

Slipaczek Chartered Financial Planners
55 Bulwer Road,
New Barnet,
Herts.
EN5 5EU

Information we collect and use:

- Information about who you are e.g. your name, birthdate and contact details.
- Information about your contact with us: e.g. meetings, emails, letters, and phone calls.
- Information connected to your product or service with us.
- Information that is automatically collected e.g. via cookies
- Information classified as sensitive e.g. health, relationship status
- Information that you may provide us about other people e.g. joint applicants or other related third parties.

- Information on children eg a child being named a beneficiary on a policy being taken out by a parent or a guardian. Information to identify the child being name, age and gender.

Where we collect your information:

Information of a personal nature may collecting directly from your or a variety of sources, including:

- Application form
- Phone conversations
- Emails or letters
- Face to face meetings
- Online services such as our website.

If you use the services of another professional e.g. an accountant or solicitor the information that has been provided may have been provided by them on your behalf.

On this website we collect information under the following circumstances:

Contact form:

When you contact us directly through our website, we do require your name and email address in order to reply. Once a message has been sent your details are sent to us and will be stored in our inbox awaiting a response.

What we collect and use your information for:

At Slipaczek Chartered Financial Planners we take your privacy extremely seriously and we will only collect what is necessary and where it is fair and lawful to do so. We will collect and you use your information only where:

- It is necessary to provide the product or service you have requested e.g. for an investment.
- It is necessary for us to meet our contractual, legal or regulatory obligations.
- In the legitimate interests of Slipaczek Chartered Financial Planners.
- In the legitimate interests of a third party e.g. sharing information to other professional contacts.
- Information that is automatically collected e.g. via cookies when you visit one of our websites.

If you do not wish us to collect and use your personal information in these ways, it may mean that we will be unable to provide you with our products or services.

Cookies

A cookie is a small file – it is saved onto your computer or other device when you visit our website.

Cookies store small pieces of information. For example - they will remember that you have visited our website or performed a certain action.

We use cookies to help us improve your experience when you visit our website. For example, a cookie might store information so you don't have to keep entering it.

Cookies also let us know which pages of our website you visited; they help us develop and market our products and services.

- Persistent cookies - these stay valid, and will work until their expiry date (unless you delete them before they expire)
- Session cookies - these expire when you close your web browser

Please note our website does include links to other websites including social media and widgets. We are not responsible for the content and privacy of these websites. Please therefore read the privacy policy of these websites.

Who we may share your information with:

We may share your information with third parties for the reasons outlined in 'What we collect and use your information for.'

These third parties include:

- Partners at Slipaczek Chartered Financial Planners
- Your employer
- Companies we have chosen to support us in the delivery of the products and services we offer to you.
- Our regulators and Supervisory Authority e.g. the Financial Conduct Authority (FCA), the Information Commissioner's Office for the UK (the ICO).
- HM Revenue & Customs (HMRC)

We will never engage in the sale of your personal details to anyone.

Where your information is processed by Slipaczek Chartered Financial Planners

All of the information provided to Slipaczek Chartered Financial Planners is processed by the practice in the UK. Each product provider(s) recommended / used will have their own respective Privacy Policy as to how they process any data.

How we protect your information

We take information and system security very seriously and we strive to comply with our obligations at all times. Any personal information which is collected, recorded or used in any way, whether on paper, online or any other media, will have appropriate safeguards applied in line with our data protection obligations.

Your information is protected by controls designed to minimise loss or damage through accident, negligence or deliberate actions. Our employees also protect sensitive or confidential information when storing or transmitting information electronically and must undertake training on this.

Our security controls are aligned to industry standards and good practice; providing a control environment that effectively manages risks to the confidentiality, integrity and availability of your information.

How long we keep your information

We intend to keep your personal information indefinitely this allows Slipaczek Chartered Financial Planners to provide you with our products or services while you are a customer and to meet current and future regulatory requirements.

Your Individual rights

You have several rights in relation to how Slipaczek Chartered Financial Planners uses your information.

- Your right of request
- Your right to be informed
- Your right to request erasure
- Your right to request that personal information be rectified
- Your right to data portability
- Your right to restrict processing.

How to make a complaint

We will always strive to collect, use and safeguard your personal information in line with data protection laws. If the unlikely event you feel we have fallen short of this, please contact us directly in order that we can put things right.

If you are still unhappy, you can complain to our Supervisory Authority. Their contact details are:

Information Commissioner's Office

Wycliffe House

Water Lane

Wilmslow

Cheshire

SK9 5AF