



Apex CB Financial Planning Ltd

WEBSITE PRIVACY AND COOIES POLICY DOCUMENT

1. PRIVACY & COOKIES POLICY

This website collects some Personal Data from its Users. The information you have provided is subject to the General Data Protection Act 2018. (The Act).

By using this website, 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.

2. DATA CONTROLLER AND OWNER

Apex CB Financial Planning Ltd, Suite 2 Jellicoe House, Admiralty Park, Station Rd, Holton Heath, Poole, BH16 6HX.

You can contact the administrator of this website by email to info@apexcb.com

3. TYPES OF DATA COLLECTED

Among the types of Personal Data that this website collects, by itself or through third parties, there are: Cookie, Usage data, First Name, Last Name, Phone number, Postcode, Email address and areas of interest.

Other Personal Data collected may be described in other sections of this privacy policy or by dedicated explanation text contextually with the Data collection.

The Personal Data may be freely provided by the User, or collected automatically when using this website.

Any use of Cookies – or of other tracking tools – by this website or by the owners of third party services used by this website, unless stated otherwise, serves to identify Users and remember their preferences, for the sole purpose of providing the service required by the User.

Failure to provide certain Personal Data may make it impossible for this website to provide its services.

Users are responsible for any Personal Data of third parties obtained, published or shared through this website and confirm that they have the third party's consent to provide the Data to the Owner.

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 or 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 company associated with us, to processing your personal data or sensitive personal data, please contact The Data Protection Officer on 01202 622223 or in writing at Suite 2 Jellicoe House, Admiralty Park, Station Rd, Holton Heath, Poole, BH1 6 6HX.

You may also wish alter your marketing preferences by accessing your own personal client site. Log in details, to access your client site, will be provided once you become a client of our firm.

You may be assured that we and any company associated with us will treat all personal data and sensitive personal data as confidential and will not process it other than for a legitimate purpose associated with the service we will provide 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 mean the duration could be indefinite.

Measures will also be taken to safeguard against unauthorised or unlawful processing and accidental loss or 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 the maximum time frame of one month.

4. DATA PROCESSING

- Your data will be lawfully and fairly processed in a transparent manner.
- Your data is collected on the grounds of explicit and legitimate purposes only.
- We will only ask for your data when necessary, explain if data will be shared and how long it will be kept.
- 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.
- Your data will only be retained as long as necessary.
- Your data will be secure.

5. METHODS OF PROCESSING

The Data Controller processes the Data of Users in a proper manner and shall take appropriate security measures to prevent unauthorised access, disclosure, modification, or unauthorised destruction of the Data.

The Data processing is carried out using computers and/or IT enabled tools, following organisational procedures and modes strictly related to the purposes indicated. In addition to the Data Controller, in some cases, the Data may be accessible to certain types of persons in charge, involved with the operation of the site (administration, sales, marketing, legal, system administration) or external parties (such as third party technical service providers, mail carriers, hosting providers, IT companies, communications agencies) appointed, if necessary, as Data Processors by the Owner. The updated list of these parties may be requested from the Data Controller at any time.

6. PLACE

The Data is processed at the Data Controller's operating offices and in any other places where the parties involved with the processing are located. For further information, please contact the Data Controller.

7. RETENTION TIME

The Data is kept for the time necessary to provide the service requested by the User, or stated by the purposes outlined in this document, and the User can always request that the Data Controller suspend or remove the data. If we provide you with financial advice, your data will be kept in accordance with Financial Conduct Authority (FCA) regulatory expectations, which in some cases mean the duration could be indefinite.

8. THE USE OF THE COLLECTED DATA

The Data concerning the User is collected to allow the Owner to provide its services, as well as for the following purposes: Analytics and Contacting the User.

The Personal Data used for each purpose is outlined in the specific sections of this document.

9. DETAILED INFORMATION ON THE PROCESSING OF PERSONAL DATA

Personal Data is collected for the following purposes and using the following services:

- ANALYTICS

The services contained in this section enable the Owner to monitor and analyse web traffic and can be used to keep track of User behavior.

Google Analytics (Google)

Google Analytics is a web analysis service provided by Google Inc. ("Google"). Google utilises the Data collected to track and examine the use of this website, to prepare reports on its activities and share them with other Google services. Google may use the Data collected to contextualise and personalise the adverts of its own advertising network.

Personal Data collected: Cookie and Usage data.

Place of processing: USA – Privacy Policy – Opt Out

- CONTACTING THE USER

User Registration and Contact form

By filling in the registration and/or contact form with their Data, the User authorises the Owners and Administrators of this website to use these details to reply to requests for information, quotes or any other kind of request as indicated by the form's header.

Personal Data collected: First Name, Last Name, Email Address, Postcode and Phone Number.

10. ADDITIONAL INFORMATION ABOUT DATA COLLECTION AND PROCESSING:

Legal action

The User's Personal Data may be used for legal purposes by the Data Controller, in Court or in the stages leading to possible legal action arising from improper use of this website or the related services. The User declares to be aware that the Data Controller may be required to reveal personal data upon request of public authorities.

Additional information about User's Personal Data

In addition to the information contained in this privacy policy, this website may provide the User with additional and contextual information concerning particular services or the collection and processing of Personal Data upon request.

System Logs and Maintenance

For operation and maintenance purposes, this website and any third party services may collect files that record interaction with this website (System Logs) or use for this purpose other Personal Data (such as IP Address).

Information not contained in this policy

More details concerning the collection or processing of Personal Data may be requested from the Data Controller at any time. Please see the contact information at the beginning of this document.

The rights of Users

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.

- The right to be informed.
- The right of access
- The right to rectification.
- The right to erasure
- The right to restrict processing
- The right to data portability
- The right to object.
- Rights to automated decision and profiling.

This Application does not support "Do Not Track" requests.

To determine whether any of the third party services it uses honor the "Do Not Track" requests, please read their privacy policies.

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/>

Changes to this privacy policy

The Data Controller reserves the right to make changes to this privacy policy at any time by giving notice to its Users on this page. It is strongly recommended to check this page often, referring to the date of the last modification listed at the bottom. If a User objects to any of the changes to the Policy, the User must cease using this website and can request that the Data Controller removes the Personal Data. Unless stated otherwise, the then-current privacy policy applies to all Personal Data the Data Controller has about Users.

Procedure approved by

Signature	
Date	23/11/2020
Print Name	Christopher Ryan