



WISE INVESTMENT

PLANNING FOR LIFE

Wise Investments Limited Privacy Policy

Wise Investments Limited, a private limited company registered in England whose registered address is at Chalford Park Barns, Oxford Road, Chipping Norton, Oxfordshire, OX7 5QR (registered company number 04970458) (“**we**”) understand that privacy is very important to you, and we are committed to protecting and respecting your privacy. We will process any personal data we may hold about you in full compliance with data protection laws applicable in the UK at all times.

We are a data controller for the purposes of data protection laws applicable in the UK. This policy, together with our terms of business for the relevant products or services we are providing to you, sets out the basis on which any personal information we hold about you will be processed by us.

1. Your personal information

Personal information means any information that we hold, or are likely to hold, relating to an identified or identifiable living individual. In practice, this means personal information we hold about our customers. From time to time, we may collect and process certain personal information about you, as detailed in our terms of business or as we otherwise inform you in writing.

You must inform us of any changes to your personal information so that we can keep it up to date. Should you notify us of such changes, we will notify any of the third parties detailed in our terms of business (if we have disclosed your personal information to them) of these changes, to ensure your records are rectified and remain accurate.

2. Where we store your personal information

Data that we collect about you will be held by us and/or our suppliers. Details of where your personal information is stored can be obtained by contacting us using the details set out in section 6 of this Privacy Policy. Where we have given you (or where you have chosen) a password which enables you to access certain parts of our online portal, you are responsible for keeping this password confidential. We ask you not to share this password with anyone.

3. Changes to our Privacy Policy

We may change this Privacy Policy from time to time. You should check this Privacy Policy frequently to ensure you are aware of the most recent version that will apply.

4. Your rights

This section explains the rights you have under data protection laws with respect to how your personal information is held and used by us. If you wish to request to exercise any of these rights, you can contact us using the details set out in section 6 of this Privacy Policy. We will grant your request only to the extent that it follows from our assessment of your request that we are allowed and required to do so under data protection laws.

You have the right to withdraw your consent to us processing your sensitive personal information at any time. This will not affect the lawfulness of any processing of your sensitive personal information that we carried out before your withdrawal. If you choose to withdraw your consent to us processing your sensitive personal information, we may not be able to provide you with certain products and services.

You have the right to access the information we hold about you, free of charge.

You have the right to ask us (and third parties to whom we transfer your personal data) to rectify your personal information if it becomes inaccurate. In order for us to do so, you must inform us of any changes to your personal information so that we can keep it up to date.

You have the right to ask us to erase your personal information if:

- you withdraw your consent to our processing of your sensitive personal data; or
- your personal data have been processed unlawfully by us; or
- your personal data are no longer necessary for the purposes for which it was collected by us; or
- you object to us processing your personal information on grounds relating to your personal situation.

We do not have to comply with a request to erase your personal information if we need to use that personal information for our overriding legitimate business interests or as may otherwise be required by law. We may not be able to provide our products or services to you if you ask us to erase your personal information.

You have the right to restrict our processing of your personal data if:

- you contest the accuracy of the personal data held by us (for a period enabling us to verify the accuracy of the data);
- our processing activities are unlawful; or



WISE INVESTMENT

PLANNING FOR LIFE

- we no longer need your personal data but you would like us to retain it to ensure its continued availability to you in connection with any legal claims; or
- you object to us processing your personal information on grounds relating to your personal situation and it is still to be confirmed whether our legitimate grounds override your right to object.

In each case listed above, we will only process your personal data with your consent or as otherwise permitted by law.

You have certain rights to obtain and reuse your personal information for your own purposes across different organisations (for example, if you wish to move to a new financial services provider, this enables you to move, copy or transfer your personal information easily between our IT systems and theirs). This applies only to your personal information that we are processing with your consent or as required for the purposes of fulfilling a contract with you, and which is being processed by automated means. In these circumstances, you have the right to obtain your personal information from us in a usable format and for that personal information to be transmitted to another company, where this is feasible.

If you believe our processing of your personal information does not comply with data protection law, you can make a complaint to the Information Commissioner's Office (ICO) using the following details:

Information Commissioner's Office

Wycliffe House

Water Lane

Wilmslow

Cheshire

SK9 5AF

Tel: 0303 123 1113

5. Governing law and jurisdiction

This Privacy Policy and any dispute or claim arising out of or in connection with it or its subject matter or formation (including non-contractual disputes or claims) shall be governed and construed in accordance with English law and the courts of England will have exclusive jurisdiction over any claim arising from, or related to, this Privacy Policy.



WISE INVESTMENT

PLANNING FOR LIFE

6. Contact

If you have any questions, would like to talk to someone about this Privacy Policy, make a request with respect to your personal information or make a complaint about how we've handled your information, please contact us at wise@wiseinvestment.co.uk