**Privacy Notice**

James Phillips & Co is the trading name of Patrick McGee Limited and is registered with the Financial Conduct Authority (553377) as an independent financial adviser. This privacy notice explains how we use any personal information we collect about you.

**What information do we collect about you?**

We collect information about you when you engage us for retirement planning advice, investment advice, insurance advice and general financial planning advice. This information provided by you will relate to your personal and financial circumstances. It may include confidential personal data, known as "special category data" such as information relating to your health, if this is necessary for the provision of our services.

If you are a member of a pension scheme we administer, we may hold more limited advice about you, such as is necessary for your membership of the pension scheme. This will be: your full name, your date of birth, your home address, your salary, your National Insurance Number, your pension contributions and your date of starting employment.

**Why do we need to collect and use your personal data?**

The primary legal intention is for the processing of your data during the performance of our contract with you. The information that we collect about you is essential for us to be able to carry out the services that you require from us effectively. Without your personal data we would be unable to fulfil our legal and regulatory obligations.

Where special category data is required we will always obtain your explicit consent to collect and process this information.

**Who might we share your information with?**

Your data will only be shared with other parties where it is necessary for the fulfilment of the required services. This means that it will primarily be shared with the financial institution(s) providing the underlying investment, pension or insurance services, to the extent required to provide the necessary services. Your data may also be shared with third parties we engage for professional compliance, accountancy or legal services, or similar institutions in the normal course of our business.

To fulfil our obligations in respect of prevention of money-laundering and other financial crime we may send your details to third party agencies for identity verification purposes.

Where third parties are involved in processing your data we will have a contract in place with them to ensure that the nature and purpose of the processing is clear, that they are subject to a duty of confidence in processing your data and that they will only act in accordance with our instructions.

Where it is necessary for your personal data to be forwarded to a third party we'll use appropriate security measures to protect your personal data in transit, including encryption of data and password protection as required.

We will not share your information with any other parties without your consent.

**How long do we keep hold of your information?**

In principle, your personal data should not be held for longer than is required under the terms of our contract for services with you. However, we are subject to regulatory requirements to retain data for specified minimum periods, which is generally 7 years after we cease dealing with you, although may be longer if directed by our Regulator. We also reserve the right to retain data for longer than this due to the possibility that it may be required to defend a future claim against us.

You have the right to request deletion of your personal data. We will endeavour to comply with this request, subject to the restrictions of our regulatory obligations and legitimate interests as noted above.

**How can I access the information you hold about me?**

You have the right to request a copy of the information that we hold about you. If you'd like a copy of some or all your personal information, please email or write to us using the contact details noted below.

We have an obligation to ensure that your personal information is accurate and up to date. Please ask us to correct or remove any information that you think is incorrect.

**Cookies**

Cookies are text files placed on a computer to collect standard internet log information and visitor behaviour. This information is used to track visitor use of the website and to compile statistical reports on website activity.

You can set your browser to remove and not to accept cookies. However, in a few cases some of our website features may not function as a result.

**What can you do if you are unhappy with how your personal data is processed?**

You have a right to lodge a complaint with the supervisory authority for data protection. In the UK:

Information Commissioner's Office  
Wycliffe House  
Water Lane  
Wilmslow  
Cheshire SK9 5AF  
0303 123 1113 (local rate)

**Changes to our privacy policy**

We keep our privacy policy under regular review and will place any updates on this web page. This privacy policy was last updated on 26th April 2018.

**How to contact us**

Please contact us if you have any questions about our privacy policy or information we hold about you. In order to do this, you should write to our Data Protection Officer: -

Mrs Sally Everett  
James Phillips & Co   
Ivy Lodge  
131A Eltham High Street

London

SE9 1TQ

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| Or email us at: [Sally@jamesphillips.co.uk](mailto:Sally@jamesphillips.co.uk) |