

Privacy Notice

Pre-Retirement Courses | Individual Coaching | Executive Retirement

This privacy notice is a statement of how Platform 50 processes personal data as part of its Pre-Retirement Workshop, Financial Education and Executive Retirement delivery, and in line with the Data Protection Act 1998 and the General Data Protection Regulation (GDPR).

Your Personal Information

Here at Platform 50 we take your privacy very seriously. We do not receive personal information from your current employer prior to the delivery of any retirement planning activity. However, as part of the process you will be asked to provide your feedback on the retirement activity you undertake with us which will be shared with the sponsoring organisation as part of our continuous improvement and evaluation process.

Sharing of Personal Data

All personal data and information that we hold will be used solely for the purposes of evaluation and will not be shared further without your prior written consent.

In addition, we may disclose your personal information:

- to the extent that we are required to do so by law;
- in connection with any legal proceedings or prospective legal proceedings;
- in order to establish, exercise or defend our legal rights (including providing information to others for the purposes of fraud prevention and reducing credit risk);
- to any person who we reasonably believe may apply to a court or other competent authority for disclosure of that personal information where, in our reasonable opinion, such court or authority would be reasonably likely to order disclosure of that personal information.

Except as provided in this privacy notice, we will not provide your information to third parties or for direct marketing without your express consent.

International Data Transfers

Any personal data will not be shared outside of Platform 50, unless required by law, nor will your personal data be transferred outside of the UK or the EEA.

Security of your Personal Information and Retention

Platform 50 takes information security extremely seriously. We retain personal information in line with customer contracts, we do not seek to retain data for any longer than necessary to carry out our service and fulfil our statutory and contractual obligations. For further details on retention periods on your personal data please use the contact details below.

Platform 50 will never process your personal information without your explicit consent and engagement in the process.

Your Rights

Under the Data Protection Act 1998 and the GDPR, you have rights as an individual which you can exercise in relation to the information we hold about you, these include;

- The right to be informed
- The right to erasure
- The right to restrict processing
- The right to portability
- The right to object
- The right to withdraw consent
- The right to complain to the Supervisory Authority

You can read more about these rights here – <https://ico.org.uk/for-the-public/is-my-information-being-handled-correctly/>

Complaints and Queries

If you want to make a complaint or query about the way we have processed your personal information, please contact the Compliance Officer using the details found at the bottom of this document.

Alternatively, if you are unhappy with our response, you have the right to complain to the Supervisory Authority, the details of which are below:

- Supervisory Authority: Information Commissioner's Office (ICO)
- Website: <https://ico.org.uk/concerns/>
- Email: casework@ico.org.uk
- Telephone: 03031231113

Statement Amendments

We may update this Privacy Notice from time-to-time. Where there is an update whilst you are engaged within activity, we will provide an updated version to you. However, if at any point you wish to view a copy of our latest Privacy Notice, please contact the Compliance Officer using the details found at the bottom of this document.

How to Contact Us

If at any time, you no longer wish for us to hold or process your data, or need to amend existing details, please email us at: paul.humphries@platform50.com or in writing by posting your request to:

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