

# CUSTOMER PRIVACY

At Primary Insurance & Finance Services we respect your privacy and the confidentiality of your personal information.

## **Who are we?**

Primary Insurance & Finance Services is a family run financial advice and insurance company. We are an appointed representative (AR) of Intrinsic Financial Services Ltd (IFS) who are part of the Old Mutual Wealth Group. For further details on the companies in our group, please click here [\[link\]](#),

## **What data do we collect and why?**

We collect personal information about you when you use our website, contact us about products and services, visit a financial adviser or carry out transactions with us. We collect information that is necessary for the provision of financial advice and administration of the products or services you are seeking, and for legal and regulatory purposes. We also collect and use your personal information where necessary to improve our services, our business processes, and to communicate with you. For the provision of advice we need to collect sensitive information, such as information about your health. To do this, we will ask for your consent.

We will always keep your data safe and secure, and where we share your data with other businesses to fulfil the purposes above we make sure they follow our instructions and keep your data secure. We will never sell your data, and we will not send you communications about unrelated services without your consent.

## **Find out more**

Our Privacy Notice, please click here [\[link\]](#), holds much more information about how we collect, use and share your personal information. There is also information about the rights you have over your personal data, and how to contact us if you have any questions. Please click here [\[link\]](#), or write to:

The Office of Data Protection,  
Intrinsic Financial Services Group,  
Wiltshire Court  
Farnsby Street,  
Swindon  
SN1 5AH