

## **PRIVACY STATEMENT**

AdviserBook is committed to protecting and respecting your privacy.

This policy (together with our terms of use at [www.AdviserBook.co.uk](http://www.AdviserBook.co.uk) and any other documents referred to on it) sets out the basis on which any personal data AdviserBook collects from you, or that you provide to AdviserBook, will be processed by AdviserBook. Please read the following carefully to understand AdviserBook's views and practices regarding your personal data and how AdviserBook will treat it. By visiting [www.AdviserBook.co.uk](http://www.AdviserBook.co.uk) you are accepting and consenting to the practices described in this policy.

For the purpose of the Data Protection Act 1998 (the **Act**), the data controller is AdviserBook Ltd (registered number 10721559) whose registered office is 12 Waterside Court, Albany Street, Newport, Gwent NP20 5NT.

### **INFORMATION ADVISERBOOK COLLECTS FROM YOU**

AdviserBook will collect and process the following data about you or, in the case of financial advisers, the individuals within your organisation:

- **Information you give AdviserBook.** This is information about you that you give AdviserBook (or is given on your behalf) by filling in any forms on this website [www.AdviserBook.co.uk](http://www.AdviserBook.co.uk) or by corresponding with AdviserBook by phone, e-mail or otherwise. It includes information you may provide to us online, or search for any firm or individual service. The information an adviser may give us may include one or more names, addresses, e-mail addresses and phone numbers, financial information and personal, business and professional details. Information provided to AdviserBook online or any messages you communicate via this website are encrypted.
- **Information AdviserBook collects about you.** With regard to each of your visits to this website AdviserBook may automatically collect the following information:
  - technical information, including the Internet protocol (IP) address used to connect your computer to the Internet, browser type and version, time zone setting, browser plug-in types and versions, operating system and platform;
  - information about your visit, including the full Uniform Resource Locators (URL), clickstream to, through and from this website (including date and time), page response times, download errors, length of visits to certain pages, page interaction

information (such as scrolling, clicks, and mouse-overs), methods used to browse away from the page.

## **COOKIES**

This website uses cookies to distinguish you from other users of our website. This helps AdviserBook to provide you with a good experience when you browse our website and also allows AdviserBook to improve our site.

### **What are Cookies?**

Cookies' are small text files that are stored by the browser on your computer or mobile phone. Websites are able to read and write these files, allowing them store things like personalisation details or user preferences. You can think of cookies as providing a "memory" for the website, enabling it to recognise a user and respond appropriately. Each web domain can only access cookies stored by that specific web domain, meaning that only the AdviserBook.co.uk servers can access the cookies set by the AdviserBook.co.uk domains.

It is possible that the AdviserBook websites contain elements from other web domains, in which case your browser may receive cookies from several sources.

### **How to control and delete cookies**

AdviserBook will not use cookies to collect personally identifiable information about you. However, if you wish to restrict or block the cookies which are set by AdviserBook, or any other website, you can do this through your browser settings.

For information on how to do this on the browser of your mobile phone you will need to refer to your handset manual.

AdviserBook does not recommend turning cookies off when visiting AdviserBook as this will prevent you from registering, signing in, and using many of the services on the site.

If you register with AdviserBook or if you continue to use this website, you agree to AdviserBook's use of cookies.

### **Other Similar Technology Used by Third Parties**

Unless you have previously opted out of marketing communications from AdviserBook or third parties, tracking technology may be used in any of the emails sent to you.

Some of our third party suppliers may send you emails, which may include a web beacon to allow us to determine the number of people who open these emails.

These web beacons or web bugs are electronic images provided by authorised third parties known as single-pixel GIFs, which are invisible graphical images.

When you click on a link in an email, we may record this individual response to allow us to customize our offerings to you. Web beacons collect only limited information, such as the time and date of an email being opened and a URL where the web beacon resides, which will identify the email that was opened.

Web beacons can be refused when delivered via email. If you do not wish to receive Web beacons via email, you will need to disable HTML images or refuse HTML (select Text only) emails via your email software.

You may opt-out of these marketing communications altogether through the administration pages of your AdviserBook account, by clicking the opt-out links in the email itself or by contacting Customer Services at [info@AdviserBook.co.uk](mailto:info@AdviserBook.co.uk).

## **USES MADE OF THE INFORMATION**

AdviserBook uses information held about you in the following ways:

**Information you give to AdviserBook.** AdviserBook will use this information:

- to help it perform statistical analysis;
- to notify you about changes to its service;
- to ensure that content from this website is presented in the most effective manner for you and for your computer; and
- in the case of any adviser firm, to provide information about its firm and specified individuals to users of this website.

**Information AdviserBook collects about you.**

AdviserBook will use this information:

- to administer this website and for internal operations, including troubleshooting, data analysis, testing, research, statistical and survey purposes;
- to improve this website to ensure that content is presented in the most effective manner for you and for your computer;
- to allow you to participate in interactive features of this service, when you choose to do so; and
- as part of any efforts to keep this website safe and secure.

## **DISCLOSURE OF YOUR INFORMATION**

You agree that we have the right to share your personal information with:

- Any member of AdviserBook's group, which means our subsidiaries, our ultimate holding company and its subsidiaries, as defined in section 1159 of the UK Companies Act 2006.
- Selected third parties including:
  - business partners, suppliers and sub-contractors; and
  - analytics and search engine providers that assist us in the improvement and optimisation of our site.

We may disclose your personal information to third parties:

- In the event that we sell or buy any business or assets, in which case we may disclose your personal data to the prospective seller or buyer of such business or assets.
- If AdviserBook Ltd or substantially all of its assets are acquired by a third party, in which case personal data held by it about its customers will be one of the transferred assets.
- If AdviserBook is under a duty to disclose or share your personal data in order to comply with any legal obligation, or in order to enforce or apply our terms of use and other agreements; or to protect the rights, property, or safety of AdviserBook Ltd, its customers, or others. This includes exchanging information with other companies and organisations for the purposes of fraud protection.

## **WHERE ADVISERBOOK STORES YOUR PERSONAL DATA**

All information you provide to Adviserbook is stored on secure servers.

Unfortunately, the transmission of information via the internet is not completely secure. Although AdviserBook will do its best to protect your personal data, it cannot guarantee the security of your data transmitted to this website; any transmission is at your own risk. Once we have received your information, we will use strict procedures and security features to try to prevent unauthorised access.

## **YOUR RIGHTS**

You have the right to ask AdviserBook not to process your personal data for marketing purposes. AdviserBook will usually inform you (before collecting your data) if it intends to use your data for such purposes or if it intends to disclose your information to any third party for such purposes. You can exercise your right to prevent such processing by any manner AdviserBook may communicate to you from time to time. You can also exercise the right at any time by contacting us at [info@AdviserBook.co.uk](mailto:info@AdviserBook.co.uk)

This website may, from time to time, contain links to and from the websites of our partner networks, advertisers and affiliates. If you follow a link to any of these websites, please note that these websites have their own privacy policies and that AdviserBook does not accept any responsibility or liability for these policies. Please check these policies before you submit any personal data to these websites.

## **ACCESS TO INFORMATION**

The Data Protection Act gives you the right to access information held about you. Your right of access can be exercised in accordance with the Act. Any access request will be subject to a fee of £10 to meet our costs in providing you with details of the information we hold about you.

## **CHANGES TO THIS PRIVACY POLICY**

Any changes to this privacy policy in the future will be posted on this page. Please check back frequently to see any updates or changes to this privacy policy.

## **CONTACT**

Questions, comments and requests regarding this privacy policy are welcomed and should be addressed to [info@AdviserBook.co.uk](mailto:info@AdviserBook.co.uk)