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## Privacy Policy Notice

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# Privacy Policy Notice

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This privacy policy notice explains how Vintage SSAS Services Ltd. uses any personal data that we may collect about you from you, your employer and/or the trustees of your small self-administered scheme (SSAS).

## A. Why we need to use your personal information

We will only process your personal data where we have a legal basis for doing so. This includes:

- / Where you have provided positive consent to us.
- / Where processing is necessary for the performance of a contract between you and us or to take steps to enter into a contract - we need to use your personal data in order to provide our services to the trustees of your SSAS and the lawful basis that we are relying on in order to collect and use your personal data, and/or special category data (i.e. data about your health), is 'performance of a contract' as per Article 6.1(b) of the General Data Protection Regulation (GDPR).
- / Where processing is necessary for compliance with a legal or regulatory obligation.
- / Where we have a legitimate interest upon which the data may be processed. Any decision to process data on the basis of legitimate interest will be made on a case by case basis and in line with the guidance set out in UK Data Protection legislation.
- / We will disclose your personal information to any governmental, legal or regulatory body if required to do so by applicable law and regulation.
- / We may need to disclose sensitive personal data about you to third parties, such as information relating to your health where required to do so to give effect to an instruction from you or your Financial Adviser in respect of your pension account.
- / We may need to transfer your personal data to another country, in which case we will ensure that your personal data is afforded the same level of protection as is required under UK Data Protection legislation and regulations prior to sending your personal data.
- / We will otherwise keep your personal information confidential and never use it for any other purpose or pass your details to any third parties without your consent.

## B. The type of information we collect about you

The information that we collect about you is restricted to whatever we need in order to provide our services to the trustees of your SSAS. This normally includes, but is not limited to, your name, address, date of birth, gender, telephone number, email address, National Insurance number, Unique Taxpayer Reference and bank account details together with similar details about your dependants.

Exceptionally, we will need information about your health and if this is required then we will obtain your explicit agreement.

## C. How we use your personal information

Unless you advise us to the contrary, we may share your personal data as necessary to provide our services to the trustees of your SSAS. This normally includes, but is not limited to, the following organisations:

- / Banks and investment managers which invest the SSAS assets.
- / Professional advisers that provide services to us and or the trustees of your SSAS.
- / HM Revenue & Customs.
- / The Pensions Regulator.
- / Your financial adviser and any other professional advisers that act for you.

## D. Marketing

From time to time, where you have provided consent, we may use your personal information to contact you by telephone, post, email or by any other electronic means, with details about the Vintage Group of Companies applications, products and services, which we feel may be of interest to you.

## E. Other sites and social media

If you follow a link from our websites, applications or services to another site or service, this Privacy Policy Notice will no longer apply. We are not responsible for the information handling practices of third party sites or services and we encourage you to read the privacy information notices appearing on those sites or services.

## F. Data retention

We will hold your personal data for as long as is necessary to meet our normal business requirements or, if longer, as long as required by law.

If we cease acting for your SSAS then we will hold your personal data for a maximum of six years after we cease acting for your SSAS.

Once your personal data is no longer needed then it will be securely destroyed.

## G. Your data protection rights

You have a number of rights under the Data Protection laws, including:

The right to request a copy of the personal information we hold on you. When you request this information, this is known as making a Subject Access Request (SAR). In most cases, this will be free of charge. However in some limited circumstances, for example, repeated requests for further copies, we may apply an administration fee.

The right to have personal information we hold about you transferred securely to another service provider in electronic form.

- / The right to have any inaccurate personal information corrected;
- / The right to have any out-of-date personal information deleted once there's no business need or legal requirement for us to hold it.
- / The right to object to, or restrict, some processing in limited circumstances and only when we don't have legitimate grounds for processing your personal information.
- / The right to object to your personal information being used to send you marketing material.
- / We will only send you marketing material where you've given us your consent to do so. You can remove your consent at any time.
- / The right to be informed of the personal data that we are collecting about you, how it's being used, how long it will be kept and whether it will be shared with any third parties. This information is contained in this Privacy Notice.
- / The right, in certain circumstances, to ask us to erase any personal data that we hold about you.

## H. Contact us

We can be contacted about this notice as follows:

In writing:            Managing Director  
Vintage SSAS Services Limited  
Fairchild House, Redbourne Avenue,  
Finchley, London  
N3 2BP  
By phone:            020 8371 3111  
By email:            compliance@vintagessas.co.uk

If you remain unhappy about any aspects of the way in which we have dealt with your personal data then you have a right to raise a complaint about this as follows:

**Information Commissioner's Office**  
Wycliffe House, Water Lane, Wilmslow, Cheshire SK9 5AF  
Tel: 0303 123 1113



The information contained within this communication does not constitute financial advice and is provided for information purposes only. Vintage SSAS Services Ltd is a company registered in England and Wales No. 12633538.

**Call: 020 8371 3111**  
**Visit: [vintagessas.co.uk](http://vintagessas.co.uk)**

**Find us at:**  
Fairchild House, Redbourne Avenue,  
Finchley, London N3 2BP

**Follow us:**  
LinkedIn: [vintage-ssas-services](https://www.linkedin.com/company/vintage-ssas-services)