



## DATA PRIVACY NOTICE

Our principal business is to provide advice and arrange transactions on behalf of clients in relation to Life, Pensions, Investments and Deposits. We provide our services from the selection of products provided by the Companies we have agencies with. We recommend the product that, in our professional opinion, is best suited to you. In providing this service to you we will need to obtain personal information from you the following outlines how we deal with this information and how it is used. Any questions or concerns you have can be addressed to us directly.

This Privacy Notice sets out the bases on which we gather, use, process and disclose any Personal Data we collect about you, or that you provide to us.

This Privacy Notice applies to you, whether you are a current, past or prospective customer. It also applies to third parties whose Data you provide to us in connection with our relationship with you (for example, the names of relatives). Please ensure that you provide a copy of this Privacy Notice to any third parties whose personal data you provide to us.

### **Who controls your Personal Data and how can you contact them?**

We control your Personal Data to allow us to give you advice and recommendations on your financial affairs, your data is then passed on to the relevant company/companies we have agencies with by way of application forms, by post email or through their secure websites online.

### **Data we may collect about You**

In order for us to give you a recommendation and information on financial products, we need to collect and process personal information about you. If you do not provide the information we need, we may not be able to offer you advice or provide our services to you. The types of personal data that are processed may include:

- Individual details - Name, address (including proof of address), other contact details (e.g. email and telephone numbers), gender, marital status, date and place of birth, nationality, employer, job title and employment history, and family details, including their relationship to you.
- Financial detail – full details on any debts, loans assets you may own.
- Identification details - Identification numbers issued by government bodies or agencies, including your PPS Number, passport number, tax identification number

### **Special Categories of Personal Data**

- Health information which has additional protection under Data Protection Law. We do not process health information other than hold the information on application forms you have filled in. The Life Insurers process and control your health data to allow them to underwrite your policy or decide decline cover, they may have further information they have obtained with your approval from your doctor, but we are not privy to this information.
- **Claims information** – information you give us with regards claims you notify us about or ask for help on.
- **Policy Information** - Information about the quotes you receive and policies you take out

13 Parnell Street,  
Waterford City,  
Republic of Ireland  
X91 K6YW

T. +353 (0)51 584776  
M. +353 (0)86 238 4225  
E. info@bwfs.ie  
 /in/barrywalshfs

### **Where We May Collect Your Personal Data From**

We may collect your personal data from various sources, including:

You, Your employer or representative, Life Companies we have agencies with, any other records you have or had any other contracts of insurance with or sought a quote from a us on that is under our agencies, otherwise we will need a letter of authorisation from you to allow us contact other companies on your behalf. When you visit our website and input a request for us to contact you. Which of the above sources apply will depend on your particular circumstances and the product or service you are interested in or your enquiry relates to.

### **Legal Bases for Processing Your Information**

We will only use your Personal Data for lawful reasons. These are: -

- a) The use is necessary for the performance of a contract to which you are a party or in order to take steps at your request prior to entering a contract (such as providing a recommendation).
- b) The use is necessary to comply with our legal obligations.
- c) You have consented to us using your information in such a way.
- d) The use is necessary for the purpose of our legitimate interests.
- e) The use is necessary for the performance of a task carried out in the public interest, such as assisting a regulatory authority's investigation of a criminal offence

### **The Purpose of Processing Your Information.**

- To give you information on and provide you with recommended financial products.
- Disclose data to policyholder, life assured, beneficiary, trustee, assignee, successors, group company or to other parties.
- To comply with legal and regulatory requirements including Anti-Money Laundering and Sanctions compliance.
- To understand how people interact with our websites (if applicable).
- To carry out and determine the effectiveness of advertising, and of marketing campaigns.