Data Collection Notice for Clients

General

Huntsman Hawkes Wealth Management needs to collect, maintain and use personal data relating to you to allow us to process your applications and provide appropriate advice during your time as a client.

Data collected during the meetings you have with your adviser will be used for the purposes of maintaining your client profile, managing the processes in relation to your products, providing the personal advice we give you and managing our on-going services to you.

Whilst you are a client, we will also share your personal data with the product providers we recommend to you for the purposes of enabling them to meet their commitments to you.

As part of our anti-money-laundering procedures we may require a photograph of you and other identifying documentation supplied by yourself. This photograph and other documentation will be used for identification and security purposes and held on your client file. We will also use a 3rd party to confirm your identification electronically.

Huntsman Hawkes Wealth Management needs to collect, process and hold on file, personal data to help with the advice we give you in accordance with your objectives and needs, this will be done through our fact finding process.

The personal data held about you is processed in accordance with the Data Protection Act 2018. It is shared internally where appropriate in order to meet the purposes detailed above. The Act requires any information held is accurate and continues to be accurate as long as you are a client; also that it has been processed fairly and lawfully. It gives you the right to check the information held and to correct it if necessary. You should contact us on a regular basis to update the information we hold on you. This will help us with our ongoing advice to you.

While you are a client

Your information will be kept securely and not shared with unconnected 3rd parties or sold on to other companies.

Huntsman Hawkes Wealth Management is required in some circumstances to disclose data, where there is a legal or regulatory obligation to do so, for example:

- In response to a statutory request by a government department or regulatory body
- To assist in the prevention or detection of crime

If you leave Huntsman Hawkes Wealth Management as a client

If you leave Huntsman Hawkes Wealth Management as a client we are legally entitled to retain the data you gave us and the information about the advice we gave you. We are not required to erase even if requested to do so. This is to help in the event a complaint is received in the future. We are legally obligated to keep information and advice pertaining to Pension Transfers indefinitely.

Contact details
The Data Guardian
Huntsman Hawkes Wealth Management
2 James Whatman Court,Turkey Mill
Ashford Road, Maidstone
Kent, ME14 5PP
Tel: 01622423080