

Privacy Notice

Fly like a butterfly, be financially free



butterfly
FINANCIAL PLANNING



Privacy Notice

Introduction

This notice provides you with information concerning our collection and use of personal data. If you have any queries regarding this statement, please do not hesitate to contact us. We are registered with the ICO in the UK and operate under the UK jurisdiction of the Data Protection Act 2018

What data we collect & what do we do with it

In order to provide financial and insurance advisory services for you, we will need to obtain some of your personal information concerning your finances, circumstances, objectives and other relevant details. We will collect, store and process this information. We will use it in order to provide you with the services you have requested.

Legal basis

We collect, control and process your personal information because this is necessary to provide you with information requested, answer any queries you may have and for the provision of our services to you. Contractual necessity is therefore the lawful basis for collecting, controlling and processing your personal details and those of your employees and service providers other than sensitive or special category personal data for which we require individual consent unless we are using the data for insurance underwriting purposes. Where we are advising on or arranging insurances, investment bonds, pensions or other insurance-based products, we need to collect and potentially share such information with providers.

Sensitive or special category personal data:

- | | |
|---|---|
|  <i>Racial or ethnic origin</i> |  <i>Genetic data</i> |
|  <i>Political opinions</i> |  <i>Biometric data</i> |
|  <i>Religious or philosophical beliefs</i> |  <i>Data concerning health</i> |
|  <i>Trade union membership</i> |  <i>Data concerning sex life or sexual orientation</i> |

None of the above type of information is normally necessary or collected by us nor is it normally required by the regulator.

We would discuss with you the need for the provision of sensitive data before you provide this information.

Sharing your data





In the course of our work with you we will share your personal data with product and service providers; we may also share you data with compliance monitoring & support organisations and regulatory bodies who are also 'Data Controllers' and registered with a supervisory authority in the EU unless otherwise indicated before we share any of your data.

We also use external data processors that will hold information for the following purposes:

Butterfly Financial Planning Limited is authorised and regulated by the Financial Conduct Authority, FRN: 945907

Butterfly Financial Planning Limited is a registered company in England, company registration number 10684845 with registered address of 1 Mannering Close, River, Dover, Kent, CT17 0uD.



-  Secure file sharing
-  Data backup
-  Dissemination of information
-  Compliance monitoring

Otherwise, we will not share your personal information with other companies without your express authority except if our firm is sold or where we are required to do so by law. So, for example, if you require us to introduce you to another firm, we will pass your data to that firm for a specific purpose with your consent. We will do this once and you would need to consent again for us to repeat this.

Cross border transfer

Should any processor hold any data on our behalf outside of the UK we will take steps to ensure that it is held in a satisfactory jurisdiction with satisfactory contractual terms that meet the requirements of UK Data Protection law.

Enquiry via our website

If you contact us via the web form on our website your data will be protected by a secure socket layer. This site is hosted at WordPress.com, which is run by Automattic Inc. We use a standard WordPress service to collect anonymous information about users' activity on the site, for example the number of users viewing pages on the site, to monitor and report on the effectiveness of the site and help to improve it. For more information about how WordPress processes data, please see Automattic's privacy notice. If you enter details into our webform these will be transmitted to us via email and temporarily stored on a Microsoft Hosted Exchange. The site is secured by [Iagnet](#) group.

Calling our business mobile line 07711 244032

This number will be either be answered by our team or your voicemail stored temporarily with O2 UK Ltd in the UK.

Whatsapp messaging on our business mobile line 07711 244032

Your message will be securely held and encrypted within the Whatsapp software.

What we will do with your enquiry

Once we have responded to your enquiry your contact details and any email response will be held on our local encrypted drive located in the UK and within our secure and encrypted CRM system [Wealthbox](#)

Doing business with us

In order to provide compliance support services we will require your contact details including personal business email addresses. Your name and email and information relating to the work we undertake for you will be stored on our encrypted devices, and added to our encrypted CRM system [Wealthbox](#).

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We can collaborate on projects using end to end encrypted services on which we have done due diligence on including.

- [Wealthbox](#)
- [FE Cashcalc](#)
- [DocuSign](#)

We may also invite you to participate in [Calendly](#) to arrange a meeting and [Zoom](#) for video conferencing and meetings. Data shared is limited to your name and email address. Zoom meeting recordings are undertaken only with your consent and for reference purposes, usually to meet our training needs.

Sometimes you may ask us to engage with your own systems and we will do so where possible and practicable.

Marketing

The information we collect about you is used solely for the purposes for which it was provided. We will never use your data or share it for marketing purposes. If we recommend a product or provider to you it will be for your benefit and not by way of marketing. Where we mention other services we do so on the basis of legitimate interest.

Retention

We will keep your personal data throughout our business relationship. At the end of any contractual relationship, we are required to continue to hold personal data under current legislation for varying periods and in some circumstances indefinitely. We may also consider it necessary to keep data beyond these timescales in order to defend any future legal action.

Your rights

Under data protection law you have the right to ask us for a copy of the information we hold about you, and to have any inaccuracies corrected or removed. You may also ask us to delete or cease processing all personal data held by us or any processor with whom we have shared your data. We may not always be able to comply with a request for deletion, but you can ask us to cease processing your data. In addition, you have the right to be informed about the data we collect, where it is located and with whom it is shared and the processing we undertake and to question any automated decision-making processes.

To do this, or if you require more information please contact us, our contact details are below.

Complaints

The UK Information Commissioner's Office is our supervising authority where you can refer any complaints about data protection. Click [here](#) for more information.

Contact

For any queries about data protection please contact:

Contact name	Jon Wood
Address	1 Mannering Close, River, Dover, Kent CT17 0UD
Telephone	07711 244032
Email	jon@butterflyfinancialplanning.co.uk

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