

How **Dexterity** uses your personal information

Dexterity is in full support of the General Data Protection Regulations (GDPR). We store your information securely, and process it only for the purpose for which we collect it. **Dexterity**'s legal basis for processing personal data: We will collect and retain your personal data for as long as necessary, to comply with our statutory and *legal obligations*, and for audit purposes.

1. **Information **Dexterity** will hold about you:**

- Personal information such as your name, address, email, phone number, date of birth and national insurance number.
- Details of when you contacted **Dexterity**, and when **Dexterity** contacted you.
- Information product providers send us about products you hold, such as policy documents, statements and reviews.

2. **Sensitive data:**

- For some products, for example life insurance, product providers will want to collect and process information about you defined as "sensitive" (such as health / medical information).
- For these cases **Dexterity** will offer you a choice of (a) you sending the information directly to the product provider, or (b) sending the information to the product provider via **Dexterity**.

3. **How we use your information:**

- For the creation and completion of quotes, illustrations and applications; for a range of financial planning products including life insurance, pension and investments.
- To carry out personal identification checks, so we comply with current anti money-laundering regulations.
- To update the data we hold about your existing policies, for which **Dexterity** is agent; for example obtaining an up-to-date valuation of your fund.

4. **Sharing your details:**

- In the course of researching and potentially executing a new policy or contract, **Dexterity** will share your information with product providers and online platforms with whom you have, or propose to have, a business relationship.
- To confirm your identity, **Dexterity** uses an online service called Veriphy. Your data is shared with Veriphy using end-to-end encryption.
- **Dexterity** will not share your information to any external companies for their own marketing use.

5. **Our commitment:**

- If you ask for it, we'll supply a copy of the personal data **Dexterity** holds for you.
- We'll make no charge and will supply the information within a week.