

## 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.