

How [Dexterity](#) uses your personal information

[Dexterity](#) follows and supports 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.