

<b>Company Name</b>	Wealth Dynamics (Trading Name: Wealth Dynamix; WDX)
<b>Policy No.</b>	WDX/2018/04
<b>Policy Name</b>	Privacy Notice - Sales & Marketing
<b>Date</b>	25 May 2018

## Privacy Notice

### Background

This privacy statement sets out the privacy policy of Sales and Marketing function of Wealth Dynamics (Trading name: Wealth Dynamix; WDX).

Wealth Dynamics Limited ('we', 'us' and 'our') is a private limited company registered in England and Wales under Company Register Number 07895806 and with its registered office at 141-145 Curtain Road, London, EC2A 3AR.

This notice describes how Wealth Dynamix (**WDX**) fulfils its obligations under applicable data protection laws, including but not limited to, Regulation (EU) 2016/679 of the European Parliament and of the Council of 27 April 2016 (the General Data Protection Regulation or GDPR) effective from 25 May 2018.

### Information we may collect

We may collect and process the following personal data about you:

- Information that you provide by filling in newsletter, partnership or enquiry forms on our website [www.wealth-dynamix.com](http://www.wealth-dynamix.com) viz. Name, email, phone numbers, job title, organisation name.
- Information such as your name, email, job title, organisation name, dietary preferences shared with us by our marketing event partners or when you forward our hosted event invites to other delegates and they RSVP.
- Your name, email, phone numbers, job title, organisation name as shared by you through business cards, direct mail, telephonic or in-person contact.
- We may also collect and process personal data which is publicly available by a third party such as held on LinkedIn, Facebook and Twitter.
- When you access our website [www.wealth-dynamix.com](http://www.wealth-dynamix.com), details of your visits to our Site (including, but not limited to, traffic data, location data, weblogs and other communication data, and the resources that you access).

We may also ask you for information when you contact us for any enquiries, product demos, partnership information or other business interests. If you contact us, we may keep a record of that correspondence.

### IP addresses

When someone visits [www.wealth-dynamix.com](http://www.wealth-dynamix.com) we use a third party service, Google Analytics and Click Dimensions, to collect standard internet log information and details of visitor behaviour patterns. We may collect information about your computer (or mobile

device), including where available your IP address, operating system and browser type, for system administration, analytics or for our own commercial purposes.

This information is only processed in a way which does not identify anyone. We do not make, and do not allow Google to make, any attempt to find out the identities of those visiting our website.

## **Cookies**

Our Site uses cookies to distinguish you from other users of our Site. This helps us to provide you with a good experience when you browse our Site and also allows us to improve our Site.

## **Where we store your personal data**

The data that we collect from you is stored on our Customer Relationship Management (CRM) system and may be transferred to, and stored at, a destination outside the European Economic Area ('EEA'). The data may also be processed by staff operating outside of the EEA who work for us, Wealth Dynamics or for one of our suppliers. Such staff may be engaged in, among other things, the fulfilment of your order and the provision of support services. By submitting your data, you agree to this transfer, storing and/or processing. We will take all steps reasonably necessary to ensure that your data is treated securely and in accordance with this Privacy Policy.

We maintain strict security standards and procedures with a view to preventing unauthorised access to your data by anyone, including our staff. All our staff and third parties, whenever we hire them to provide support services, are required to observe our privacy standards and to allow us to audit them for compliance.

## **Why we require this data**

We require and collect the personal information about you:

- To provide you with information, products or services that you request from us or which we feel may interest you, where you have consented to be contacted for such direct marketing purposes
- To carry out our obligations arising from any contracts entered into between you and us or to manage our relationship with you and communicate.
- To meet our on-going regulatory and compliance obligations, including in relation to recording and monitoring communications, disclosures to tax authorities, financial service regulators and other regulatory and governmental bodies, and investigating or preventing crime;
- To undertake transactional and statistical analysis, and related research
- To ensure that content from our Site is presented in the most effective manner for you and for your computer (or mobile device). We may use your information collected from the website to personalise your repeat visits to our website.

We may also use your data to provide you with information about goods and services of the Wealth Dynamix (WDX) which may be of interest to you and where you have provided consent we may contact you about these by post, telephone, email or text message.

## **Disclosure of your information**

We may disclose personal data for internal and administrative purposes and where you give consent to provide you with information regarding our products, services, future marketing events and job opportunities.

We may disclose personal data to third parties that are specifically engaged by us to provide services to us, in which case we will require those parties to keep that information confidential and secure and use it solely for the purposes of providing the specified services to us.

## **Children's Personal Information**

We do not knowingly collect any personal information about or from children under the age of 13. If you are under the age of 13, please do not submit any personal information through our website. We encourage parents and legal guardians to monitor their children's Internet usage and to help enforce this Policy by instructing their children never to provide personal information through the Websites or Services without their permission. If you have reason to believe that a child under the age of 13 has provided personal information to us, please contact us at [dataprivacy@wealth-dynamix.com](mailto:dataprivacy@wealth-dynamix.com), and we will use commercially reasonable efforts to delete that information.

## **How long we will store your data**

Personal data held by us will be kept confidential. How long we hold your personal data for will vary and will be determined by various criteria, including:

- The purpose for which we are using it - we will need to keep the data for as long as is necessary for that purpose; and
- Legal obligations - laws or regulations may set a minimum period for which we have to keep your personal data.

We periodically review all the personal data held with us to assess the necessity of retaining it for business purpose and undertake necessary remediations as appropriate.

## **Your rights in relation to your data**

- You have a right to access the information which we hold about you. If you wish to make an application to access or obtain this information, please contact us. In some circumstances, you have the right to receive some personal data in a structured, commonly used and machine-readable format and/or request we transmit that data to a third party where this is technical feasible.
- We take reasonable steps to ensure that the personal data we collect, use or disclose is accurate, complete and up-to-date. Please contact us if any of the details you have provided changes. Please also contact us if you believe that the information we have about you is not accurate, complete or up-to-date.
- If you wish us to erase or restrict using your data, please contact us. We may need to discuss with you the basis of your request as there may be circumstances where

we are legally entitled to continue processing your personal data/refuse your request.

- If you have previously provided your consent to our use of your data and you wish to withdraw consent, please contact us. We may need to discuss with you whether our use of your data needs to continue for lawful purposes.
- Law provide us 30 days to action your request relating to your personal information held by us. We would endeavour to respond within 10 days where possible.
- If you have any complaints in relation to the way we have used your information, please contact us in the first instance. You also have the right to lodge a complaint with the Information Commissioner's Office at Wycliffe House, Water Lane, Wilmslow, Cheshire SK9 5AF (Tel 0303 123 1113), if you think your rights have been infringed by us.

### **How to contact us**

Please contact us if you have any questions about our privacy policy or information we hold about you:

- by [email](#)
- or write to us at: Privacy Team, Wealth Dynamics Ltd., 141-145 Curtain Road, London, EC2A 3AR.

### **Changes to our Privacy Notice**

This noticed was updated on 25<sup>th</sup> May 2018. We reserve the right to change this notice at any time.