



PRIVACY NOTICE

Veritas Paraplanning Ltd is committed to protecting personal data and handling it responsibly.

This Privacy Notice explains how personal information is processed when providing paraplanning services to financial adviser firms.

Who we are

Veritas Paraplanning Ltd is a UK limited company providing outsourced paraplanning support to financial adviser firms.

What information is processed

Personal data may be received from adviser firms and can include:

- Identification and contact details
- Financial and personal circumstances
- Policy and investment information
- Any other information required to support financial advice

How information is used

Personal data is processed solely to:

- Support the preparation of suitability reports
- Carry out research and analysis
- Assist adviser firms in delivering financial advice

Personal data is not used for marketing purposes.

Lawful basis for processing

Personal data is processed on the basis of:

- Legitimate interests (to provide paraplanning services)
- Legal and regulatory obligations

Data Sharing

Personal data is not shared with third parties except:

- Where required to obtain provider information or illustrations
- Where required by law or regulation

Data Security

Appropriate technical and organisational measures are in place to protect personal data, including secure systems, restricted access and data handling procedures.

Data Retention

Personal data is retained only for as long as necessary to fulfil its purpose and meet legal or regulatory requirements.

Your Rights

Individuals have the right to:

- Access their personal data
- Request correction of inaccurate data
- Request erasure where appropriate
- Restrict or object to processing

Requests should be directed to the adviser firm in the first instance.

Data Protection Registration

Veritas Paraplanning Ltd is registered with the Information Commissioner's Office (ICO) and processes personal data in accordance with UK GDPR and the Data Protection Act 2018.

Contact

For any queries:

Veritas Paraplanning Ltd

vikki.adams@veritasparaplanning.com