

## Privacy Information Notice (for clients)

### 1 Our Contact Details

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**Morhart Pension Services Ltd**

Unit G8, Temple 1852  
Lower Approach Road  
Temple Meads  
Bristol  
BS1 6QS

0117 467 7784  
[hello@morhart.co.uk](mailto:hello@morhart.co.uk)  
[www.morhart.co.uk](http://www.morhart.co.uk)

### 2 The type of information we collect

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We currently collect and process the following information which may include:

- **Personal information:** Your name, date of birth, gender, marital status together with details and any reference numbers such as your National Insurance Number and Unique Tax Reference Number.
- **Contact information:** Details we need to contact you such as personal address, employment address, e-mail address and telephone number/s.
- **Financial information:** Bank account details of you and your employer together with their financial status. For example, the financial status of your employer, a company involved with a potential investment of the SSAS, or the status of a potential beneficiary of the SSAS.
- **Family members:** Personal details and contact information of your spouse. In order to process death benefits, this may be extended to other family members or individuals.
- **Employment details:** The name and contact details of your employer together with the date you joined and your expected retirement date.
- **Other pension schemes:** The contact details, policy numbers and the value of any other pension provision you may have together with details of any transitional protection you have on your retirement benefits.

## 3 How we get the information and why we have it

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Most of the information we collect comes from the completion of our forms. These may be sent to us by post, e-mail or via our secure portal.

Other information we collect may be obtained or sent to us via:

- Post
- E-mail
- Telephone
- Our website\*
- Third party websites
- Our secure portal
- Social media

*\*This includes collecting information by using cookies (please see our Cookie Policy for more information) and Google Analytics.*

We need to collect this data to fulfil our obligations as the scheme administrator and professional trustee of the SSAS's which we administer on behalf of our clients and their advisers.

We may also pass information on to a third party, for example a regulatory body such as HMRC. Again, this is to fulfil our obligations and as the administrator and professional trustee of your SSAS.

In some circumstances we may ask for your consent to process your information, for example for certain direct marketing communications or for market research purposes. You are free to withdraw your consent at any time.

## 4 How we store the information

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The security and storage of your data is important to us and we have put in place appropriate security measures to prevent your data from being lost or accessed in unauthorised ways. These include:

- Information being stored on secure servers with firewall technology.
- When telephoning, security measures are in place to confirm the identity of you and any relevant third party.
- Access to data is limited to relevant and authorised personnel only.
- Employee vetting and training.

In addition, details of your SSAS will be accessible via a Secure Portal. To access the portal you will be required to create an account with secure login credentials.

Please note that the transmission of information using the internet is not completely secure. Although we will do our best to secure your information, we cannot guarantee the security of information sent to us electronically and this is sent at your own risk.

We may retain your information after our client's SSAS has been wound-up and/or benefits transferred to a different provider or if an application has been declined. This information will only be held for as long as necessary so we can fulfil our obligations as the scheme administrator and professional trustee of the SSAS.

When the information is no longer needed it will be disposed of in a secure manner.

## 5 Your rights

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Under data protection legislation, you have the right to ask us:

- **Access:** For copies of your personal information.
- **Rectification:** To correct personal information you think is inaccurate. You also have the right to ask us to complete information you think is incomplete.
- **Erase:** To erase your information in certain circumstances.
- **Restriction of processing:** To restrict the processing of your information in certain circumstances. For example, if you would like us to establish its accuracy.
- **Object to processing:** To object to the processing of your personal information in certain circumstances. For example, for the purposes of marketing.
- **Transfer of data:** That we transfer the information which you provided to us to another organisation, or to you.

You will not be charged for exercising your rights and we have one month to respond to requests. Please contact us (see Section 1) if you wish to make a request.

## 6 How to complain

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If you have any concerns about our use of your information, you can make a complaint to us at:

**Morhart Pension Services Ltd**

Unit G8, Temple 1852  
Lower Approach Road  
Temple Meads  
Bristol  
BS1 6QS

0117 467 7784  
[hello@morhart.co.uk](mailto:hello@morhart.co.uk)

If you are unhappy with how we have used your data you can also complain to the Information Commissioner's Offices at the address below:

**Information Commissioner's Office**

Wycliffe House, Water Lane  
Wilmslow, Cheshire  
SK9 5AF

[www.ico.org.uk](http://www.ico.org.uk)  
0303 123 1113