



TRPP Wealth Management GDPR Consent Form



TRPP Wealth Management

Romsey office:-

*Kestrel House
Alma Road
Romsey
Hampshire
SO51 8ED*

Wimborne office:-

*Communications House
23D West Street
Wimborne
Dorset
BH21 1JS*

Tel: +44 (0)1794 517066

www.trpp.co.uk

Email: info@trpp.co.uk

Data Protection

TRPP Wealth Management is a firm of Chartered Financial Planners.

We collect and process your personal data (as defined in the UK General Data Protection Regulation (UK GDPR)) in the course of providing our services. We are a data controller (as defined in the UK GDPR) of such personal data, which means we decide the purposes and means of the processing of personal data. Full details of how we process personal data can be found in our privacy notice, at <https://www.trpp.co.uk/trpp-document-library> OR which is provided with our Client Service Charter.

In particular, we draw your attention to the fact that we may collect and process personal data in relation to your health where you provide this either in a written application or by speaking with an adviser. This data will be collected and processed in accordance with our privacy notice and used solely for the purpose of researching and advising on one or more products to suit your needs and assisting you with the application for and ongoing management of such products. We may therefore have to pass your health data to third party organisations such as Best Practice IFA Group Limited, financial service providers and/or financial product providers in relation to your application or ongoing management of such services or products (as applicable).

We may also have to share your health data with relevant regulators as required by law or regulation.

Any such sharing of health data is expressly for the aim of providing you with the best possible advice and financial outcomes. We do not pass your data to third party organisations for marketing purposes.

In 'Your declaration' below, you provide us with your consent to the above processing and sharing of your health data.

We may not be able to provide a full range of services without such consent, and withdrawal of consent may require us to stop providing our services to you.

Data processing

By signing this Agreement, you agree that we may collect and process your personal data including your health data. This consent can be withdrawn at any time but please note that we cannot provide a full range of services without this consent and withdrawal of consent is likely to result in us having to cease providing our services to you.

Please tick this box to confirm you understand and consent to our processing of personal data relating to your health and our passing such special category data to third-party service providers as listed in this Agreement*. *(Health information is important for most financial planning, and in some areas such as mortgage, protection and drawing pensions benefits, it is necessary.)* ☐

From time to time, we send our clients information promoting our services, or other similar services which we believe you may be interested in. If you would prefer not to receive this information, please tick the box below. Alternatively, please contact The Data Protection Officer on 01403 334455 or in writing at Broadlands Business Campus, Langhurst Wood Road, Horsham, West Sussex, RH12 4QP.

Please tick this box if you do not wish for us to contact you for marketing purposes by e-mail, telephone, post or SMS* ☐

*Where client is under the age of 16 consent must be given by either the parent or legal guardian for this data to be processed.

Data Protection Consent

Customer name(s)	
Customer signature(s)	
Date	