

# Protecting your personal data



Changes to UK data privacy law are coming into effect on 25 May 2018 under the **General Data Protection Regulation (GDPR)**, which will give individuals additional rights about the way their personal information is collected and used.

It will increase transparency and give you more control and more protection.

At Rathbones, we recognise the importance of the personal information we receive, take seriously our responsibility to use it appropriately and welcome these additional protections.



# How will GDPR benefit you?

You currently have a legal right to access the personal information we hold about you and you can request your information be deleted or updated. You can also ask us not to send you any direct marketing communications, meaning advertising material aimed specifically at you.

The new regulation will give you additional rights that require us to correct or delete any errors in the information we hold about you. You will have the right to ask us to restrict our processing and, where that processing is based on your consent, you will be able to withdraw that consent.

We will consider any objection you may have, relating to your particular circumstances, to any of our processing activities. You may also request a copy of the personal information we hold about you, which you provided to us, in a format that is suitable for sending to another organisation, such as another financial institution.

These changes will bring great benefit to our clients; you will have better protection of your personal information, more control and greater flexibility.

Your rights under these laws are not unqualified and, in certain circumstances, your request may be refused. You have the right to refer such instances to the Information Commissioner (ICO).

A full description of your personal information rights can be found in our privacy notice at [rathbones.com/privacy](https://rathbones.com/privacy) or you may request a printed copy from our data protection officer.

# How do we gather and use your personal information?

We collect your personal information in a number of ways. This begins with any interactions we have before you become a client.

We store any relevant information obtained by third parties from the routine checks conducted before we accept you as a client. After joining Rathbones, you may provide us with further personal information (at meetings, by telephone or in written correspondence), which we also store.

We then process this personal information primarily to fulfil our contractual services to you. By processing, we mean obtaining, recording, holding and using your data. It may be necessary to use a third party to process your information to ensure we are providing an efficient service to you and operating in a client-friendly manner. More details are included in our privacy notice.

You may provide us with personal information about other people (for example, members of your family). In these instances, we ask that you have their authority to provide this information to us. There are also legal, regulatory and other governance requirements that we need to comply with that require us to process your personal information.

As we operate globally, it is possible that your personal information will be transmitted to and processed in countries outside of the European Economic Area that may not provide the same level of data protection. Where this happens, we put in place adequate measures to ensure that your information is suitably protected when it is transferred out of Europe.

# How do we share and store your personal data?

Rathbone Investment Management (as data controller) may share your personal information with other Rathbones Group companies and, where it is relevant to services provided to you, it might be made available to third parties. In addition, we may occasionally be required by law, tax or other regulatory authorities to report certain personal information.

We will keep your personal information for as long as we provide you with the services referred to in any Terms of Business or other contract. We may sometimes be obliged to keep your data for longer for legal, regulatory or other governance reasons.

Our privacy notice is available at [rathbones.com/privacy](https://rathbones.com/privacy) or can be obtained from our data protection officer.

## Contact us




If you have any questions about GDPR or your personal information, please contact our **data protection officer** by writing to:

**Rathbone Investment Management**  
Port of Liverpool Building  
Pier Head, Liverpool L3 1NW



# Rathbones

Look forward

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