



CHURCHILLS INTERNATIONAL
CONSULTING LIMITED

PRIVACY NOTICE

INTRODUCTION

Churchills International Consulting Limited (“Churchills” “we”, “us”, “our” and “ours”) offers a range of employee benefits to employers. This includes, but are not limited to, protections, pensions, medical and dental policies. We recognise that the security of personal data is of the utmost importance to our clients and its employees and as such, we have put in place the following privacy notice.

This privacy notice is not contractual and we may update or amend it any time. Please refer to paragraph 11 below for further details in this regard. It is important that you read this privacy notice and together with any other policies and notices that we may provide from time to time on occasions when we are collecting personal data.

1. PURPOSE OF THIS NOTICE

This notice describes how we collect and use personal data about you, in accordance with the General Data Protection Regulation (‘GDPR’) and any other national implementing laws, regulations and secondary legislation, as amended or updated from time to time, in the UK (‘Data Protection Legislation’).

Please read the following carefully to understand our practices regarding your personal data and how we will treat it.

2. ABOUT US

Churchills is are registered in England and Wales as a limited company under number: 01659058 and our registered office is at 12 Bridgford Road, West Bridgford, Nottingham, NG2 6AB. Our correspondence address is:

Churchills International Consulting Limited
Chartwell
Edingley
NG22 8BZ
United Kingdom

For the purpose of the Data Protection Legislation and this notice, we are the ‘data controller’. This means that we are responsible for deciding how we hold and use personal data about you. We are required under the Data Protection Legislation to notify you of the information contained in this privacy notice.

We have appointed a data protection officer. Our data protection officer is our Data Protection Point of Contact and is responsible for assisting with enquiries in relation to this privacy notice or our treatment of your personal data. Should you wish to contact our Data Protection Point of Contact you can do so using the contact details noted at paragraph 12 (Contact Us), below.

We may also act as a 'data processor' in the performance of our services to our clients and our contracts with our clients impose on us the obligations required by the GDPR when acting in this capacity.

3. HOW WE MAY COLLECT YOUR PERSONAL DATA

We obtain personal data about you, for example, when:

- you request a proposal from us in respect of the services we provide;
- our clients engage us to provide our services and also during the provision of those services;
- you contact us by email, webinar, telephone, post (for example when you have a query about our services);
- you participate in employee benefits programmes offered by our clients;
- you use our website or web based platform; or
- from third parties and/or publicly available resources (for example, from your employer or from Companies House).

4. THE KIND OF INFORMATION WE HOLD ABOUT YOU

The information we hold about you and may process may include the following:

- details of contact we have had with you in relation to the provision, or the proposed provision, of our services;
- details of any services you have received from us;
- our correspondence and communications with you;
- information about any complaints and enquiries you make to us;
- information from research, surveys, and marketing activities;
- your personal contact details such as name, title, addresses, telephone numbers, and work and/or personal email addresses.
- tax codes or Unique Tax Payer Reference Numbers.
- date of birth.

- gender.
- nationality and domicile.
- marital status and dependants.
- next of kin, beneficiaries and emergency contact information.
- national Insurance number.
- bank account details, payroll records and tax status information.
- salary (including commissions and bonuses), annual leave, pension and benefits information.
- start date and end date of employment (and information and agreements surrounding termination of employment).
- location of employment or workplace.
- employment records (including job titles, work history, working hours, and contract of employment).
- policy numbers and values of funds in benefits such as pension, childcare vouchers.
- Information we receive from other sources, such as publicly available information, information provided by your employer, our clients or information from our member network firms.

We may also hold and process certain special categories of data including:

- Data concerning health, medical history or absence from work due to illness.
- Data concerning health and medical history for the purposes of underwriting where the data subject is in excess of the Free Cover Limit for protection benefits.
- Data concerning health where the data subject wishes to join a medical plan which requires underwriting.

5. HOW WE USE PERSONAL DATA WE HOLD ABOUT YOU

We may process your personal data for purposes necessary for the performance of our contract with our clients and to comply with our legal obligations. This may include processing your personal data where you are an employee, subcontractor, supplier or customer of our client.

We may process your personal data for the purposes of our own legitimate interests provided that those interests do not override any of your own interests, rights and

freedoms which require the protection of personal data. This includes processing for marketing, business development, statistical and management purposes.

We may process your personal data for certain additional purposes with your consent, and in these limited circumstances where your consent is required for the processing of your personal data then you have the right to withdraw your consent to processing for such specific purposes.

Please note that we may process your personal data for more than one lawful basis depending on the specific purpose for which we are using your data.

We may also transmit personal data to relevant insurers or product providers in order for us to provide the agreed services. Where personal data is not provided, or the right to process is withdrawn, we may be unable to provide the agreed services.

Situations in which we will use your personal data

We may use your personal data in order to:

- carry out our obligations arising from any agreements entered into between our clients and us (which will most usually be for the provision of our services);
- carry out our obligations arising from any agreements entered into between our clients and us (which will most usually be for the provision of our services) where you may be a subcontractor, supplier or customer of our client;
- provide you with information related to our services and our events and activities that you request from us or which we feel may interest you, provided you have consented to be contacted for such purposes;
- provide you with information relating to products and services offered by insurers or product providers;
- seek your thoughts and opinions on the services we provide or those services and products provided by insurers or product providers; and
- notify you about any changes to our services or those of insurers or product providers.

In some circumstances we may anonymise or pseudonymise the personal data so that it can no longer be associated with you, in which case we may use it without further notice to you.

If you refuse to provide us with certain information when requested, we may not be able to perform the contract we have entered into with you or our client. Alternatively, we may be unable to comply with our legal or regulatory obligations.

We may also process your personal data without your knowledge or consent, in accordance with this notice, where we are legally required or permitted to do so.

Data retention

We will only retain your personal data for as long as is necessary to fulfil the purposes for which it is collected.

When assessing what retention period is appropriate for your personal data, we take into consideration:

- the requirements of our business and the services provided;
- any statutory or legal obligations;
- the purposes for which we originally collected the personal data;
- the lawful grounds on which we based our processing;
- the types of personal data we have collected;
- the amount and categories of your personal data; and
- whether the purpose of the processing could reasonably be fulfilled by other means.

Change of purpose

Where we need to use your personal data for another reason, other than for the purpose for which we collected it, we will only use your personal data where that reason is compatible with the original purpose.

Should it be necessary to use your personal data for a new purpose, we will notify you and communicate the legal basis which allows us to do so before starting any new processing.

6. DATA SHARING

Why might you share my personal data with third parties?

We will share your personal data with third parties where we are required by law, where it is necessary to administer the relationship between us or our clients or perform the contract with our client, to comply with the requirements of our regulator the Financial Conduct Authority, or where we have another legitimate interest in doing so.

Which third-party service providers process my personal data?

“Third parties” includes third-party service providers and the members of our firm’s network. The following activities are carried out by third-party service providers: IT services, professional advisory services and banking services.

All of our third-party service providers are required to take commercially reasonable and appropriate security measures to protect your personal data. We only permit our third-party service providers to process your personal data for specified purposes and in accordance with our instructions.

What about other third parties?

We may share your personal data with other third parties, for example in the context of the possible sale or restructuring of the business. We may also need to share your

personal data with a regulator (including the Financial Conduct Authority) or to otherwise comply with the law.

In order to perform contacts with our clients we will share personal data with insurers and product providers to enable them to place you on cover, provide quote for those services or products and for the purposes of enabling us to carry out benchmarking and comparison services.

7. TRANSFERRING PERSONAL DATA OUTSIDE THE EUROPEAN ECONOMIC AREA (EEA)

We will not transfer the personal data we collect about you outside of the EEA without your prior consent.

Where we transfer personal data outside of the EEA, we will ensure that there is an adequacy decision by the European Commission in relation to the applicable law therefore it will be deemed to provide an adequate level of protection for your personal information for the purpose of the Data Protection Legislation.

If there is not an adequacy decision by the European Commission in relation to any country to which we request your permission to transfer personal data, then it will not be deemed to provide an adequate level of protection for your personal information for the purpose of the Data Protection Legislation. Where applicable, to ensure that your personal data is treated by those third parties in a way that is consistent with and which respects the Data Protection Legislation, we will ensure measures such as binding corporate rules model contract clauses are in place.

8. DATA SECURITY

We have put in place commercially reasonable and appropriate security measures to prevent your personal data from being accidentally lost, used or accessed in an unauthorised way, altered or disclosed. In addition, we limit access to your personal data to those employees, agents, contractors and other third parties who have a business need to know. They will only process your personal data on our instructions and they are subject to a duty of confidentiality.

We have put in place procedures to deal with any suspected data security breach and will notify you and any applicable regulator of a suspected breach where we are legally required to do so.

9. RIGHTS OF ACCESS, CORRECTION, ERASURE, AND RESTRICTION

Your duty to inform us of changes

It is important that the personal data we hold about you is accurate and current. Should your personal information change, please notify us of any changes of which we need to be made aware by contacting us, using the contact details below.

Your rights in connection with personal data

Under certain circumstances, by law you have the right to:

- Request access to your personal data. This enables you to receive details of the personal data we hold about you and to check that we are processing it lawfully.

- Request correction of the personal data that we hold about you.
- Request erasure of your personal data. This enables you to ask us to delete or remove personal data where there is no good reason for us continuing to process it. You also have the right to ask us to delete or remove your personal data where you have exercised your right to object to processing (see below).
- Object to processing of your personal data where we are relying on a legitimate interest (or those of a third party) and there is something about your particular situation which makes you want to object to processing on this basis. You also have the right to object where we are processing your personal information for direct marketing purposes.
- Request the restriction of processing of your personal data. This enables you to ask us to suspend the processing of personal data about you, for example if you want us to establish its accuracy or the reason for processing it.
- Request the transfer of your personal data to you or another data controller if the processing is based on consent, carried out by automated means and this is technically feasible.

If you want to exercise any of the above rights, please email our data protection point of contact.

You will not have to pay a fee to access your personal data (or to exercise any of the other rights). However, we may charge a reasonable fee if your request for access is clearly unfounded or excessive. Alternatively, we may refuse to comply with the request in such circumstances.

We may need to request specific information from you to help us confirm your identity and ensure your right to access the information (or to exercise any of your other rights). This is another appropriate security measure to ensure that personal information is not disclosed to any person who has no right to receive it.

10. RIGHT TO WITHDRAW CONSENT

In the limited circumstances where you may have provided your consent to the collection, processing and transfer of your personal data for a specific purpose (for example, in relation to direct marketing that you have indicated you would like to receive from us), you have the right to withdraw your consent for that specific processing at any time. To withdraw your consent, please email our data protection point of contact.

Once we have received notification that you have withdrawn your consent, we will no longer process your personal information (personal data) for the purpose or purposes you originally agreed to, unless we have another legitimate basis for doing so in law.

11. CHANGES TO THIS NOTICE

We reserve the right to update this privacy notice at any time to ensure compliance with the laws and legislation of the UK and any other relevant associations or bodies

of authority e.g. the Financial Conduct Authority (FCA), Information Commissioners Office (ICO).

Any changes we may make to our privacy notice in the future will be updated on our website at: www.churchillsconsulting.com.

12. CONTACT US

If you have any questions regarding this notice or if you would like to speak to us about the manner in which we process your personal data, please email at dataprotectionofficer@churchillsconsulting.com.

You may write also to us at:

Churchills International Consulting Limited
Chartwell
Edingley
NG22 8BZ

You also have the right to make a complaint to the Information Commissioner's Office (ICO), the UK supervisory authority for data protection issues, at any time. The ICO's contact details are as follows:

Information Commissioner's Office
Wycliffe House
Water Lane
Wilmslow
Cheshire
SK9 5AF

Telephone - 0303 123 1113 (local rate) or 01625 545 745

Website - <https://ico.org.uk/concerns>