

# Data Protection Notice: Bankhall PMS Firm

## Data Protection Act 1998 - Use of your personal information

### **Bankhall PMS Limited trading as Bankhall and as PMS (“Bankhall PMS”) and you -**

Bankhall PMS Limited is part of Sesame Bankhall Group Limited. Within the Sesame Bankhall group are companies which can provide extra value services to your firm. Many of these services can be seen on our corporate websites at [www.bankhall.co.uk](http://www.bankhall.co.uk) and [www.trustpms.com](http://www.trustpms.com).

Bankhall PMS collects data about your firm and the individuals working for it on application to join Bankhall PMS, and during the course of commission processing. This data may be held on computer-based databases and in paper files.

### **How is your information used?**

Bankhall PMS may process information about your firm for the purposes of administering your firm's agreement with it (in particular, to enable commission to be paid to you and the correct level of service to be supplied by product providers), for market analysis, market research purposes, and as required by law or regulation or recommended by any code of practice relevant to the industry.

Bankhall PMS holds regular meetings with its major product providers and lenders and will share specific details about Bankhall PMS Adviser firms with these parties to ensure that Bankhall PMS Advisers are receiving the most appropriate services from product provider's customer relationship team and information of commission terms.

### **Confidentiality**

Bankhall PMS does not share information about your firm with other Bankhall PMS Advisers unless you have given express permission for us to do so, for example should your firm contribute to Bankhall Adviser articles. Bankhall PMS does not use information about your firm to credit score or to open/close agencies with providers or lenders.

### **New products**

Bankhall PMS regularly conducts market research/surveys and Bankhall PMS would like to provide your firm with information about its other products and services and those of other Sesame Bankhall group products and services. Bankhall PMS would also like to be able to make your firm's details available to other reputable third parties within the general insurance, mortgage and life and pensions/financial services industry that will be able to provide you with products and services tailored to your requirements.

An example of this would be the feedback that delegates from your firm provide during Bankhall Learning seminars via the questions using the electronic handsets.

We stress that information about your firm would only be used in this way to allow product providers to improve the service they offer you whether that be through appropriate product contact programmes, telephone or face-to-face contact support. As we all know, time is precious and none of us want to be bombarded with information that is simply not relevant or which we do not require.

**Please tick below or alternatively contact Bankhall PMS at the address below if you do not wish information about your firm to be used in this way.**

### **Your right to a copy of your personal data**

Under the Data Protection Act you have a right, upon payment of a fee, currently £10, to obtain a copy of the information Bankhall PMS holds about your firm. If you believe that any information held is incorrect or incomplete, you should contact Bankhall PMS at the address below without delay. Any information that is found to be incorrect or incomplete will be amended promptly.

### **Overseas processing**

Bankhall PMS may need to process information about your firm in countries that are outside the European Economic Area and in which the data protection laws may not be as comprehensive as those in the EEA. However, Bankhall PMS has taken appropriate steps to ensure the same level of protection for information about your firm in other countries as in the European Economic Area.

**FAO: The Data Protection Officer, c/o The Membership Team  
Sesame Bankhall Group Limited, The Southmark Building, 3 Barrington Road,  
Altrincham, Cheshire WA14 1GY.  
Tel: 08450030400, option 1, Fax: 08450030401**

My firm does not wish to receive information about other Bankhall PMS products or services	
My firm does not wish to receive information about the products or services of other Sesame Bankhall group companies	
My firm does not wish to receive information about the products or services of other carefully selected third parties from within the Life and Pensions / Financial Services industry.	

Firm name: .....

Principal's name: .....

Principal's signature: .....

Date: .....