

# Privacy Notice for Introducers

- COUNTRYWIDE TAX & TRUST CORPORATION LIMITED is registered in England. Registered address –  
30 Binley Road, Coventry, West Midlands, CV3 1JA. Registration number – 04844596.
- COUNTRYWIDE TAX & TRUST CORPORATION LIMITED's permitted business is advising on or  
drafting legal documentation.

This privacy notice explains how we use any personal information we collect about you.

This is our Privacy Notice for Introducers, a legal requirement of the General Data Protection Regulation (GDPR) which takes effect from 25 May 2018. It sets out how we collect, use, store and safeguard personal data together with details about our obligations under the GDPR.

## What information do we collect about you?

We collect information about you when you enter into a professional arrangement with us as an Introducer of prospective clients who we will engage with us for estate planning / legal services. Most of the personal data we hold will be provided by you when you complete an Introducer Agreement with us. It includes information that is capable of identifying an individual and includes but is not limited to:

- Name.
- Contact details, including address, telephone numbers and email addresses.
- The network or firm you currently work for
- Details of commission payments made to you.
- Bank account details.

The legal basis for holding your details is for the performance of the Introducer Agreement you have with us. If you do not provide the information we need in order to set up and manage the Introducer Agreement, we may not be able to enter into or continue the introducer relationship.

In addition we will collect and use personal data relating to members and prospective members you have introduced to us. Our use of this information is detailed in our general Privacy Notice.

You must ensure that you have permission to collect and pass on to us the personal data of a potential member or investors. We will rely on you to ensure that you have a lawful basis for providing this information and have obtained consent from the prospective member to do so.

## Who might we share your information with?

In order to deliver our services to you effectively we may send your details to third parties such as those that we engage for professional compliance, accountancy or legal services.

## Who has access to your information?

Our staff may need to access your information in order to manage your Introducer Agreement, deal with your enquiries or pay you commissions.

We will not pass on your personal information to any other company, organisation or individual for them to market or sell anything to you. We will not sell, trade or rent your personal data to any third parties.

If we are required by law we may have to pass on information to legal and regulatory authorities including, but not limited to, HMRC, or for anti-money laundering and fraud prevention the police.

We will never sell or pass on your data to other organisations to market their products to you.

### How long do we keep hold of your information?

During the course of our relationship with you we will retain personal data which is necessary to provide services to you. We will take all reasonable steps to keep your personal data up to date throughout our relationship. We reserve the right to retain data for as long as is required thereafter where we believe it is in our legitimate interests to do so.

You have the right to request deletion of your personal data. We will comply with this request, subject to the restrictions of our regulatory obligations and legitimate interests as noted above.

### How can I access the information you hold about me?

Your rights under the Data Protection Act are as follows:

1. The right to be informed
2. The right of access
3. The right to rectification
4. The right to erasure
5. The right to restrict processing
6. The right to data portability
7. The right to object
8. Rights in relation to automated decision making and profiling

Please note that you have the right to request the above, however, when we receive your request we may object to your request if we do not agree with it. We will however inform you if the request has been granted or not.

You have the right to request a copy of the information that we hold about you. If you would like a copy of some or all of your personal information please email our Data Protection Officer on [compliance@countrywidegroup.co.uk](mailto:compliance@countrywidegroup.co.uk) or write to us using the contact details noted below. You will be required to complete a Subject Access Request form and provide us with proof of your identity in order for us to comply with your request and depending on the work involved a charge might be made.

We have an obligation to ensure that your personal information is accurate and up to date. Please ask us to correct or remove any information that you think is incorrect.

### Cookies

We use cookies to track visitor use of the website and to compile statistical reports on website activity. For further information visit <http://www.allaboutcookies.org/> You can set your browser not to accept cookies and the above website tells you how to remove cookies from your browser. However in a few cases some of our website features may not function as a result.

## Google Analytics

This website uses Google Analytics, a web analysis service provided by Google Inc., 1600 Amphitheatre Parkway, Mountain View, California 94043, USA. Google Analytics also uses cookies that allow, among other things, to analyse the way you use the website. As a rule, the information generated by these cookies is transferred to and stored on a server operated by Google in the USA. Google will use this information on behalf of the operator of this website in order to evaluate your use of the website, compile reports regarding website activities and provide services for the website operator relating to website and Internet usage. These reports and services are used to continuously improve the facilities offered by this website. You can prevent the storage of cookies by making an appropriate setting in your browser. We must point out, however that if you do so, you will be unable to use all the functionalities of this website to their full extent. You can also prevent the capture and processing of data relating to your use of the website (incl. your IP address), generated by these cookies, by Google by simply downloading and installing the following Google browser plug-in, clicking on the following link: <https://tools.google.com/dlpage/gaoptout?hl=en>.

Google's data privacy statement, is available at [www.google.com/intl/en/policies/privacy/](http://www.google.com/intl/en/policies/privacy/)

## Vimeo

This website contains embedded Vimeo videos on some pages or provides links to Vimeo videos. Vimeo is a video service provided by Vimeo Inc, 555 West 18th Street, New York, New York 10011. Vimeo's data privacy statement is available at <https://vimeo.com/privacy>

## Other websites

Our website contains links to other websites. This privacy policy only applies to this website so when you link to other websites you should read their own privacy policies.

## What can you do if you are unhappy with how your personal data is processed?

You have a right to lodge a complaint with the supervisory authority for data protection. In the UK, this is:

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

## Changes to our privacy policy

We keep our privacy policy under regular review and we will inform you of any changes when they occur. This privacy policy was last updated on 11th April 2018.

## How to contact us

Please contact us if you have any questions about our privacy policy or information we hold about you, by email, at: [compliance@countrywidegroup.co.uk](mailto:compliance@countrywidegroup.co.uk)

Or write to us at: Countrywide Tax & Trust Corporation Ltd, Abbotsfield House, 43 High Street, Kenilworth, Warwickshire CV8 1RU