

PRIVACY POLICY

IMPORTANT NOTICE

This is the privacy notice of D.B Alison & Partners Insurance Services at 33 Buccleuch St, Dumfries, DG1 2AB, referred to as **we, us or our** in this privacy notice.

This privacy notice sets out how we collect and process your personal data. This privacy notice also provides certain information that is legally required and lists your rights in relation to your personal data.

This privacy notice relates to personal information that identifies you as a natural person (whether you are an actual or potential customer, an individual who browses our website or an individual outside our organisation with whom we interact). We refer to this information in this privacy notice below.

The privacy and security of your personal information is very important to us so we want to assure you that your information will be properly managed and protected by us at all times. Please read this privacy notice carefully as it explains how we may collect and use your personal data.

This privacy notice may vary from time to time so please check it regularly.

HOW TO CONTACT US

CONTROLLER AND CONTACT DETAILS

For the purposes of relevant data protection legislation, we are a **controller** of your personal data. As a controller we use (or **process**) the personal data we hold about you in accordance with this privacy notice.

If you need to contact us in connection with the use or processing of your personal data, then you can do so using our contact details as set out below.

DATA PROTECTION REPRESENTATIVE

Our data protection representative is Douglas Alison who you can contact at 01387 261248 or insure@dbalison.com

The personal details we collect about you may include the following information:

- Personal data you provide to us in person, or by telephone.
- Personal data you provide when you enquire about insurance or when you become a client, including information about your company and other employees.
- General information about you, such as your name, address and contact details.
- Financial details, such as your bank account and card details.

We collect your personal data from you as a controller when you enquire about insurance or become a client. This may also involve the collection of data from or about others who are associated with you such as your employees or representatives.

PERSONAL INFORMATION

We will use personal information about you mainly to:-

- Provide you with a quotation from Insurers.
- Arrange a policy if instructed to do so by you.
- Arrange changes to and/or renewal of your policy if requested to do so.
- Arrange Premium Finance/Consumer credit for you if require.
- Statistical analysis.

Some of the personal information we ask you to provide may be sensitive (special category) as defined in the legislation. For example you may have to give us information about medical history, criminal convictions or driving offences. We are allowed by the legislation to collect such information for insurance purposes without specific consent but it will only be used for the purposes set out above.

If you give us information about another person, in doing so you confirm that they have given you permission to provide it to us and that we may use their personal data in the same way as your own as set out in this notice.

LEGAL BASIS FOR PROCESSING YOUR PERSONAL INFORMATION

We are required to have a lawful basis (as defined in the legislation) in order to process your personal data and the relevant bases which we use are shown in the table below.

Purpose of processing	Lawful Basis
Providing quotations; arranging and administering insurance policies	Necessary for the performance of an insurance contract
Arranging Premium Finance/ Consumer Credit	Necessary for the performance of a consumer credit contract
To notify you of changes in our service	Our Legal and Regulatory obligations
To prevent and detect fraud, money laundering and other financial crimes	Our Legal and Regulatory obligations
To meet general legal or regulatory obligations	Our Legal and Regulatory obligations
Statistical analysis	Our legitimate interests – to refine and enhance the products and pricing which we can offer.

DISCLOSURE OF YOUR PERSONAL INFORMATION

As a necessary part of providing you with the services described above or in our legitimate interests we may need to disclose your personal data to certain third parties. These include:-

- Premium Finance companies
- Computer bureaux/Software Houses
- Insurers
- Other insurance Intermediaries
- Insurance Industry databases
- Government databases
- Credit agencies
- Regulatory authorities
- The Police and other law enforcement bodies

YOUR RIGHTS AND RETENTION PERIOD

We will only store your data for as long as is necessary to comply with the requirements of your membership and any legal obligations or lawful processing conditions that may exist as a result. You have a number of rights concerning the personal information we use, which you may ask us to observe. In some cases even when you make a request concerning your personal information, we may not be required, or be able to carry out your request as this may result in us not being able to fulfil our legal and regulatory obligations under the lawful processing conditions under which we hold your data or because there is a minimum statutory period of time for which we have to keep your information. If this is the case, we'll let you know our reasons.

You can ask us to:

- Provide a copy of your personal information
- Correct or delete unnecessary or inaccurate personal information
- Restrict or object to the use of your personal information at any time
- Object to any automated decision, including profiling. Where an automated decision has been made we will advise you of this and your rights
- Provide your personal data in a structured, commonly used and machine-readable format and to have your personal data transferred to another controller. This right only applies where our processing of your personal data is automated and the processing took place initially with your consent or for the performance of a contract with you
- Where we rely on your consent to use your personal information, you can withdraw that consent at any time. Where your consent is withdrawn, your previous consent is withdrawn, your previous consent will remain valid in respect of our use of your information prior to the date you withdrew it, or if any marketing material has been sent prior to you advising that you don't want us to contact you again.

If you have any questions or concerns about this privacy notice or your data protection rights please contact us using our details set out at the beginning of this privacy notice.

You also have the right to make an enquiry or to complain to the Information Commissioner's Office (ICO) if you are unhappy with our use of your data, or if you think we have breached a legal requirement. Further details about the ICO are available at: www.ico.org.uk



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