

## **1. Introduction**

Morgan Law (Financial Services) Ltd provides financial planning advice and investment advice (or 'wealth management' advice as it is also called), to individuals, charities, trusts and companies

When this policy mentions "Morgan Law", "we", "us", "our" all of those terms refer to Morgan Law (Financial Services) Ltd (company number: 2700622) with registered offices located at Hyde Park House, Crown Street, Ipswich IP13BJ.

The person responsible for data protection is Simon Browne. You can contact him by eMailing him at [Simon.browne@Morganlawfs.co.uk](mailto:Simon.browne@Morganlawfs.co.uk), or by calling him on 01473 598888, or by writing to him at Morgan Law (Financial Services) Ltd, Hyde Park House, Crown Street, Ipswich IP13BJ.

## **2. Purpose of this policy**

The objective of this policy is to give clear indications on how Morgan Law processes your personal data when you visit the website. It also gives information with regards to the way personal data is being processed when you submit a request to be contacted.

## **3. Data protection laws**

We process your personal data in line with UK laws and regulations and more specifically The General Data Protection Regulation (GDPR)

## **4. Consent**

Under GDPR, consent should be given in a positive and affirmative way by individuals who share their personal data with organisations. According to the European Data Protection Directive, consent means: "any freely given specific and informed indication of his wishes by which the data subject signifies his agreement to personal data relating to him being processed."

When you submit your personal data on the website, you need to submit it along with your affirmative consent. We will also record your consent.

## **5. Personal data collected**

We gather a certain amount of personal data from the website. We only collect the personal data that you directly submit to us through the "contact us" form.

The data collected includes all of the following:

First name, Surname, Phone number, Address and a summary of your enquiry.

Morgan Law collects this data so as to be able to contact you once you have submitted a request.

## **6. Data usage**

The following details how we use the data that you have submitted to Morgan Law through the website:

- Understand your needs and whether we may be able to help you.

- Contact you with regards to the query you have submitted
- Provide you with information as to how the firm may be able to help you
- Confirm what is required so that the firm can provide you with advice

## **7. Third parties and overseas transfers**

When your personal data needs to be transferred to an overseas country that is not part of the EEA (European Economic Area), we will always ensure that there are adequate levels of protection and a similar legislation with regards to data protection. Each country might have different laws and regulations with regards to data protection, however there are some agreements in place, e.g. the privacy shield for the United States of America. Overseas transfers will only be possible when we have your prior affirmative consent to process your personal data. We will contact you to obtain such consent when required.

## **8. Data security safeguards**

You have several rights with regards to your personal data under GDPR. You can submit a “subject access request” if you wish to obtain a copy of all the personal data we hold about you. You can request to have your personal data updated and you can also require to have your data deleted and not be further processed. You can also request to have your personal data transferred to another controller.

## **9. Your rights under the General Data Protection Regulation**

Under the GDPR, you have all the following rights:

- The right to rectification
- The right to access
- The right to erasure
- The right to restriction
- The right to object
- The right to lodge a complaint

In order to exercise those rights, please contact Simon Browne at Hyde Park House, Crown Street, Ipswich IP13BJ.

## **10. Subject Access Request**

You can ask us to provide you a copy of the personal data you provided us with during the initial collection. With regards to access to your personal data, please contact Simon Browne. He can be contacted at [Simon.browne@Morganlawfs.co.uk](mailto:Simon.browne@Morganlawfs.co.uk), or by calling him on 01473 598888, or by writing to him at Morgan Law (Financial Services) Ltd, Hyde Park House, Crown Street, Ipswich IP13BJ.

## **11. Additional information**

If you have any questions with regards to this privacy policy, the way your data is handled or if you would like to exercise any of your rights GDPR, please contact Simon Browne at [Simon.browne@Morganlawfs.co.uk](mailto:Simon.browne@Morganlawfs.co.uk), or by calling him on 01473 598888, or by writing to him at Morgan Law (Financial Services) Ltd, Hyde Park House, Crown Street, Ipswich IP13BJ.

## **12. The Information Commissioners Office (ICO)**

If you would like to learn more about the General Data Protection Regulation, you can visit the ICO's website following this link: <https://ico.org.uk/>. You can also find an overview of the GDPR following this link: <https://ico.org.uk/for-organisations/data-protection-reform/overview-of-the-gdpr/>