

PRIVACY POLICY

This website is provided by Brooks Macdonald Group plc which is the holding company of:

- Brooks Macdonald Asset Management Limited
- Brooks Macdonald Financial Consulting Limited
- Brooks Macdonald Funds Limited and
- Braemar Group plc

These companies are authorised and regulated by the Financial Services Authority and are registered with the Information Commissioner's Office.

This privacy policy explains how we use any personal information we collect about you when you use this website.

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What information do we collect about you?

We collect information about you when you register with us, become our client, apply to use any of our services or contact us in person, by telephone, by e-mail or by post. We also collect information from you when you voluntarily complete customer surveys, provide feedback or complete a contact form on our website. When you access or use our websites, website usage information is collected using cookies.

How will we use your information?

We collect information about you for the following reasons:

- To process your application to use our services
- To verify your identity to help prevent money laundering and financial crime
- To help protect your information and prevent unauthorised access to your information
- To help to improve the services we provide to you

We may use your information collected from the website to personalise your repeat visits to our websites and in assessing and monitoring how you and others access and use our website. This is so that we can improve our website.

Your personal information will not be shared between different companies within our group of companies unless you have consented to this.

Information will be shared with third parties where this is necessary to enable us to provide our services to you or to allow us to comply with our legal or regulatory obligations. Third parties with whom we will share your information and the reasons for this are as follows:

<i>Brokers and other intermediaries</i>	We share information with brokers and other intermediaries, consultants and service providers in order to carry out the purchase and sale of shares on your behalf and to ensure we can provide and maintain the provision of services to you.
<i>The Financial Services Authority and other regulators</i>	The Financial Services Authority, other regulatory bodies and some government agencies have a legal right to access the information we hold. We have a legal obligation to disclose information we hold to such bodies.
<i>Our professional advisers</i>	Our appointed auditors, accountants, lawyers and other professional advisers sometimes require access to the information we hold in order to advise us.
<i>Pension trustees, bond providers and other such service providers</i>	You may ask us to advise you in relation to pensions, offshore bonds, onshore bonds, trusts and other such products or you may ask us to set up such products on your behalf or manage investments within such products. In such cases, we will share information with the providers of such products in order to provide our services to you. We may also be required to share information with auditors appointed by the providers of such products.
<i>Credit reference agencies, fraud prevention agencies and related service providers</i>	We have to verify your identity to help prevent money laundering and financial crime. If you consent, we will do this when you first approach us to provide our services to you, as part of our account opening process and annually thereafter. A third party provides us with an electronic identity verification system which we use to verify your identity. This requires us to send your information electronically to a third party who will then pass information on to credit reference and fraud prevention agencies.

We will not share your information with third parties except as set out in this Privacy Policy. We will not lend or sell your information to third parties for any reason.

Marketing and communication

We would like to send you information about products and services of ours and other companies in our group which may be of interest to you. We would also like to send you news and information about the financial markets and financial services. We will seek your consent before sending you any such marketing or communications. When you register with us or apply to use our services you may specify your marketing and communication preferences or indicate that you do not wish to receive news or information. If you have consented to receive marketing or other communications you may change your preferences or opt out at a later date. You have a right at any time to stop us from contacting you for marketing purposes. If you no longer wish to be contacted for marketing purposes or you wish to change your marketing and communication preferences you may contact us using the contact details below.

Access to your information and correction

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 the personal information we hold about you please contact us using the contact details below.

We want to make sure that your personal information is accurate and up-to-date. You may ask us to correct or remove information you think is inaccurate.

Cookies

Cookies are text files placed on your computer to collect standard internet log information and visitor behaviour information. This information is used to track visitor use of the website and to compile statistical reports on website activity.

For further information about cookies visit www.aboutcookies.org or www.allaboutcookies.org.

We have to obtain your consent before placing cookies on your computer. We will ask you to consent to our use of cookies and to the terms of use of our website when you try to access our website. Clicking 'Accept' when prompted will indicate your consent. If you do not consent, you may click 'Decline' when prompted.

You can set your browser settings not to accept cookies and the above websites tell you how to remove cookies from your browser. However, if you do not consent to cookies being placed on your computer or you set your browser not to accept cookies, some of our website features may not function or you may not be able to access parts of our website.

Other websites

Our website contains links to other websites. However, this Privacy Policy only applies to this website. If you navigate to other websites you should read the privacy policies on those sites.

Changes to our Privacy Policy

We keep our Privacy Policy under regular review and we will place any updates on this webpage. This Privacy Policy was last updated on 14 September 2011.

How to contact us

Please contact us if you have any questions about our Privacy Policy or information we hold about you by:

E-mail: compliance3@brooksmacdonald.com

Post: Brooks Macdonald Group plc, 111 Park Street, Mayfair, London W1K 7JL.