



homeline

Your Mortgage & Protection Specialists

Privacy Notice

Homeline Mortgages Ltd FCA 565780
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www.homelinemortgages.co.uk

Privacy Notice

Homeline Mortgages Limited are an appointed representative of AMAC Mortgages Limited which is authorised and regulated by the Financial Conduct Authority No: 302881. This privacy notice explains how we use any personal information we collect about you.

What information do we collect about you?

We collect information about you when you engage us for Mortgage and Protection advice. This information will relate to your personal and financial circumstances. It may also include special categories of personal data such as data about your health, if this is necessary for the provision of our services.

We may also collect information when you voluntarily complete client surveys or provide feedback to us.

Information relating to usage of our website is collected using cookies. These are text files placed on your computer to collect standard internet log information and visitor behaviour information. We'll use your information collected from the website to personalise your repeat visits to the site.

Information about connected individuals

We may need to gather personal information about your close family members and dependants in order to provide our service to you effectively. In such cases it will be your responsibility to ensure that you have the consent of the people concerned to pass their information on to us. We'll provide a copy of this privacy notice for them or, where appropriate, ask you to pass the privacy information to them.

Why do we need to collect and use your personal data?

The **primary legal basis** that we intend to use for the processing of your data is for **the performance of our contract with you**. The **secondary legal basis** that we may use for the processing of your data is **legitimate interests**. The information that we collect about you is essential for us to be able to carry out the services that you require from us effectively. Without collecting your personal data we'd also be unable to fulfil our legal and regulatory obligations.

Where special category data is required, we'll obtain your explicit consent in order to collect and process this information. Special categories of personal data are certain categories of personal data that are sensitive by nature. The categories include: data revealing racial or ethnic origin, political opinions, religious or philosophical beliefs, trade union membership and data concerning health.

Depending on the nature of the products and services that you engage us for we may need to obtain your sensitive personal data particularly in relation to health.

How will we use the information about you?

We collect information about you in order to provide you with the services for which you engage us.

Who might we share your information with?

If you agree, we may email you about other products or services that we think may be of interest to you.

We won't share your information for marketing purposes with companies outside our group of companies.

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 as well as product and platform providers that we use to arrange financial products for you.

Where third parties are involved in processing your data we'll have a contract in place with them to ensure that the nature and purpose of the processing is clear, that they are subject to a duty of confidence in processing your data and that they'll only act in accordance with our written instructions.

Where it's necessary for your personal data to be forwarded to a third party we'll use appropriate security measures to protect your personal data in transit. Homeline Mortgages use Office 365 / Azure RMS. If you would like further information on this, please email compliance@homelinemortgages.co.uk.

To fulfil our obligations in respect of prevention of money-laundering and other financial crime we may send your details to third party agencies for identity verification purposes.

How long do we keep hold of your information?

During the course of our relationship with you we'll retain personal data which is necessary to provide services to you. We'll take all reasonable steps to keep your personal data up to date throughout our relationship.

We're also subject to regulatory requirements to retain your data for specified minimum periods.

These are, generally:

- Three years for mortgage business
- Three years for insurance business

These are **minimum** periods, during which we have a legal obligation to retain your records.

We reserve the right to retain data for longer where we believe it's in our legitimate interests to do so.

You have the right to request deletion of your personal data. We'll 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?

You have the right to request a copy of the information that we hold about you. If you'd like a copy of some or all of your personal information, please email or write to us using the contact details noted below.

When your personal data is processed by automated means you have the right to ask us to move your personal data to another organisation for their use.

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.

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

You also 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

0303 123 1113 (local rate)

Changes to our privacy policy

We keep our privacy policy under regular review and we'll place any updates on this web page or inform you of any changes when they occur. This privacy policy was last updated on 15/05/2020.

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@homelinemortgages.co.uk

Or write to us at:

The Compliance Officer

Homeline Mortgages Ltd

Homeline House

4 Beta Centre

262 Ringwood Road Poole

Dorset BH14 0RS

Marketing

We'd like to send you information about our products and services or giving your information to other members of the group which may be of interest to you. If you've agreed to receive marketing information, you may 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 please contact us by email at marketing@homelinemortgages.co.uk or by post.

Please indicate if we can contact you. Please tick either one or both boxes so that we can advise you of products and services from time to time.

- Yes, please give me details about products or services in which you think I may be interested.
- Yes, I am happy for you to pass my details to carefully selected third parties so they can contact me about their products and services.

Please indicate you preferred methods of contact, if all methods tick all boxes.

We would like to provide details to you about products or services we think will interest you. Please tick the relevant boxes below to authorise us to contact you via the following methods:

- via telephone
- via post
- via email
- SMS

You may inform us at any time if you want to change your options.

Client Full Name	Client Full Name
Client Signature	Client Signature
Date	Date