

**Directors:**

Leslie W.P. Whitfield – CEO, CeMap, CertCII-MP
Andrew S.P. Whitfield – Processes, Systems, IT

Company Secretary:

Andrew S.P. Whitfield, MPhys, Sensei

FCA Firm Ref No: 482614

Data Protection Register No. Z1354876

Company Registered in England and Wales; Number 6567926

A: 6 Keppel Place
Stoke
Plymouth, PL2 1AX

T: 01752 561981

M: 07799 668078

E: info@lea-financial-services.co.uk

W: www.lea-financial-services.co.uk

PRIVACY NOTICE

Who we are:

LEA FS is a trading style of LEA Financial Services Limited, which are mortgage and Insurance advisers and Commercial Finance Brokers based in Plymouth but operating throughout the UK. Our contact details are as in the letterhead above as are details about who regulates us.

What data do we collect?

LEA FS collects the following data:

- Personal identification information (Name, email address, phone number, residential address, etc.)
- Financial data (Employer details, employed and self-employed income, banking records, additional income sources, outgoings and commitments, etc.)

How do we collect your data?

You directly provide LEA FS with most of the data we collect. We collect data and process data when you:

- Register online or other communication methods for our services.
- Voluntarily complete a fact-find on our secure portal or contact us by telephone or via email.
- Use or view our website via your browser's cookies.

LEA FS may also receive your data indirectly from the following sources:

- Existing service providers or your Accountant, if you have authorised this

How will we use your data?

LEA FS collects your data so that we can:

- Process your application and manage your request.
- Email you with special offers on other products and services we think you might like.

If you agree, LEA FS will share your data with our partner companies so that they may offer you their products and services.

- Mortgage lenders, insurance companies, commercial lenders, utility providers, etc.

How do we store your data?

LEA FS securely stores your data at our premises, on a secure server.

LEA FS will keep your data for a minimum of 7 years or until the product term has expired. Most of our clients have found it beneficial that we do not delete their records as they have been able to recover records that would otherwise have been lost. However, once our need to retain records has passed, we are content to delete your records on request.

Marketing

LEA FS would like to send you information about products and services of ours that we think you might like, as well as those of our partner companies. By signing our Terms of Business and opting in to these services, you will have authorised us to do this.

If you have agreed to receive marketing, you may always opt out at a later date.

You have the right at any time to stop LEA FS from contacting you for marketing purposes or giving your data to other members of the LEA FS Group.

What are your data protection rights?

LEA FS would like to make sure you are fully aware of all of your data protection rights. Every user is entitled to the following:

The right to access – You have the right to request LEA FS for copies of your personal data. We may charge you a small fee for this service.

The right to rectification – You have the right to request that LEA FS correct any information you believe is inaccurate. You also have the right to request LEA FS to complete the information you believe is incomplete.

The right to erasure – You have the right to request that LEA FS erase your personal data, under certain conditions.

The right to restrict processing – You have the right to request that LEA FS restrict the processing of your personal data, under certain conditions.

The right to object to processing – You have the right to object to LEA FS's processing of your personal data, under certain conditions.

The right to data portability – You have the right to request that LEA FS transfer the data that we have collected to another organization, or directly to you, under certain conditions.

If you make a request, we have one month to respond to you. If you would like to exercise any of these rights, please contact us through any of the methods listed at our letterhead or below (**How to contact us**)

Privacy policies of other websites

LEA FS's websites contain links to other websites. Our privacy policy applies only to our website, so if you click on a link to another website, you should read their privacy policy.

Changes to our privacy policy

LEA FS keeps its privacy policy under regular review and places any updates on this web page. This privacy policy was last updated on 11th May 2023.

How to contact us

If you have any questions about LEA FS's privacy policy, the data we hold on you, or you would like to exercise one of your data protection rights, please do not hesitate to contact us.

Email us at: info@lea-financial-services.co.uk

Call us: 01752 561981

Or write to us at: 6 Keppel Place, Stoke, Plymouth PL2 1AX

How to contact the appropriate authority

Should you wish to report a complaint or if you feel that LEA FS has not addressed your concern in a satisfactory manner, you may contact the Information Commissioner's Office via their website at <https://ico.org.uk/make-a-complaint/>. You will be able to connect with them through the 'live chat' facility or call them on 0303 123 1113.