

PRIVACY POLICY

Our updated Privacy Policy will protect your data, and ensure we're using the information you've given us correctly.

Ahead of the new data protection laws, which come into force in May 2018, we have made some important amendments to ensure our Privacy Policy is compliant.

We want to assure you that you always have complete control over how we handle your details, which means that you may opt out at any time. And of course, we will always keep your data totally secure.

Company Statement

Broadsure Direct Ltd have embraced the changes in respect to GDPR.

Our aim is for the firm to remain compliant and respectful when processing or handling customer data.

The Firm has trained all staff with the principles of GDPR and has also appointed a GDPR contact person.

Broadsure Direct Ltd are committed to being completely transparent and honest in everything we do.

Our lawful basis for processing

The lawful basis for processing are set out in Article 6 of the GDPR and Broadsure Direct Ltd have reviewed the 6 available lawful basis for processing and have selected the following that suit the nature of the business and how you as our customer(s) wish to do business with us, they are as follows:

(a) Consent: the individual has given clear consent for you to process their personal data for a specific purpose.

(b) Contract: the processing is necessary for a contract you have with the individual, or because they have asked you to take specific steps before entering into a contract.

Consent – we speak to all of our customers at least annually and on inception or renewal of your policy. For new or prospective customers, we check at quotation stage the consent we require to provide you with the services you have contacted us about. If at any point – you wish to withdraw consent, restrict or limit your consent please contact the firm outlined below and we will respond to your email within 24hrs:

- **Call us on:** 01843 594477
- **Email us on:** lynnejacques@broadsuredirect.com

What information do we collect and how we will use the information about you?

Broadsure Direct Ltd hold and process personal data for you, our Customers and Prospective Customers.

We collect relevant policy information in order to obtain quotations, renewals or perform mid-term changes.

We also collect payment and general finance information in order to pay or fund insurance policies. This information we hold regarding you, our customers or prospective customers is checked annually and verbally upon renewal.

All staff are aware that the information we request and subsequently pass on must be relevant to you, our customers' requirements and be relevant to each of our underwriter's request for information regarding the quotation, renewal or finance & administration of a policy.

We collect information about you when you register your interest for our products or services. We also collect information when you voluntarily complete customer surveys, provide feedback and participate in competitions. Website usage information is collected using cookies.

Processing activities – what we do with our key partners

We work with the following key partners to help us to provide you with our service:

Lead Providers – we purchase leads from approved firms, these firms are reviewed to ensure they remain relevant and compliant.

Insurance Companies - we share your information with our panel of approved insurers in order to obtain quotations for requested policies and appropriate accompanying policies. We also administer claims and general policy changes on yours and the insurers behalf communicating information requests and receipts between both.

Finance Houses - we arrange and administer finance proposals in order to secure funding on request for your, our customers insurance policies and in line with our scope of permission.

Compliance – we share information with our compliance consultants. This is usually done by file audits to determine such things but not exhaustive of KPIs (Key Performance Indicators) relating to the firms TCF (Treating Customers fairly) regime.

Solicitors – we utilise a firm of solicitors to provide customer with accident management services. We will not pass your information to this firm unless you expressly request us to. We will administer by leasing between you both if and when required.

Access to your information and correction & your right to be forgotten

You have the right to request a copy of the information that we hold about you. We want to make sure that your personal information is accurate and up to date.

You have the right, at any time to ask us to correct or remove information you think is inaccurate. We do not charge for this service.

Please contact our team for us to make the appropriate changes for you:

- **Call us on:** **01843 594477**
- **Email us on:** lynnejacques@broadsuredirect.com

Current policy data requests are handled within 24hrs, expired policies within the current business year can take up to 7 days and all other requests are handled within 30 days, the firm works within these guidelines.

Retention

The timely destruction of data - all customer or prospective customers sensitive data that is separated immediately at source and kept in a secure locked bin identified by the colour red. These bins are collected daily and subject to onsite industrial cross shredding.

Once a policy has lapsed or cancelled, the information is securely kept for a period of 7 years.

How we update and remove the data

Broadsure Direct review and correct customer data throughout the year and when speaking to customers every 12 months upon their renewal. It is the firm's policy to always speak to the customer on or around the renewal of the policy.

When inaccurate data is identified, the firm will react immediately to the source where the data is currently stored, where the data was received from and identify any third parties the firm has shared any data with. The firm will act quickly to identify and amend these inaccuracies or potential breaches.

Marketing

Consent is obtained verbally when speaking initially to prospect customers, arranging new policies and annually upon renewal of exiting policies. Where you give us consent – we will also use your data to send you marketing communications for the products and services we offer and may benefit you. You decide how you want us to contact you, weather by email, phone or text message and you can update your communication preferences at any time by telling us when things change. From time to time we will also send you a communication to update and refresh your communication preferences.

Prospect Customers

This category implies – customers who have received quotations from us and have yet to complete the contract. In order to facilitate a quotation for insurance products and associated products and finance as requested, we will ensure we gain clear and verbal consent from you before we begin.

Within this section – we will always gain your consent to contact you in the future and where we are not successful with the current years offer – should you not wish to receive future contact, please advise the telesales person immediately and they will follow procedure and for a formal reply, please also email your request to: lynnejacques@broadsuredirect.com

Existing Customers

Throughout the year and without fail annually upon renewal, we will request your consent to market to you current and relevant products from our key providers. Should you not wish to receive future contact, please advise the telesales person immediately and they will follow procedure and for a formal reply, please also email your request to: lynnejacques@broadsuredirect.com

Broadsure Direct Ltd Website and other websites

The Firms' website address is www.broadsuredirect.com

This is our only website address and should only be accessed via this address. The website has simple forms attached to it which collect basic quotation information and allows this data to be emailed to our main office. The website does not store or interact with you to provide or administer insurance contractors. The firm remains predominantly a telesales and face to face broker.

This Privacy Policy is also available on our website along with our Complaints Procedure.

If you have any questions or comments regarding our website, you can contact us as detailed below:

- **Call us on:** **01843 594477**
- **Email us on:** lynnejacques@broadsuredirect.com

Our website contains links to other websites. This privacy policy only applies to this website so when you link to other websites you should read their own privacy policies.

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 visit www.aboutcookies.org or www.allaboutcookies.org.

You can set your browser not to accept cookies and the above websites tell you how to remove cookies from your browser.

However, in a few cases, some of our website features may not function as a result.