

broadsuredirect Ltd

INSURANCE INTERMEDIARY

PRIVACY POLICY

Broadsure Direct is committed to protecting your data and respecting your privacy. The firm has trained all staff with the principles of General Data Protection Regulation (GDPR). Broadsure Direct follows strict procedures on how your personal and business information is used and stored.

The firm's primary aim is to remain compliant and respectful when processing and handling customer data. We are committed to being transparent and honest, therefore, customers should know they have complete control over how we handle your details and can opt out of communication at any time.

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

Broadsure Direct Ltd holds and processes personal data for our current and prospective customers. We collect relevant policy information to obtain quotations, renewals or to perform mid-term changes. The information we request from you will also be used to obtain premium finance quotations when you have requested funding of your insurance premiums.

Our Lawful Basis for Processing

The lawful basis for processing is presented in Article 6 of the General Data Protection Regulation, Broadsure Direct have reviewed this article, and selected the aspects most relevant to the nature of our business and our customers.

- a) **Consent.** Individuals must give clear consent for us to process their data for a specific purpose. We speak to exiting customers annually to confirm consent. For new or prospective customers, we ask for consent within the quotation stage.
- b) **Contract.** Processing is necessary to have a contract with an individual or if an individual asks to take specific steps before entering into a contract.

If at any time you wish to withdraw, restrict, or limit the consent you have provided, please contact the firm and we will respond within twenty-four hours.

Call Broadsure Direct on 01843 594477 or email info@broadsuredirect.com

Processing activities – What we do with our Key Partners

Lead Providers. Broadsure Direct purchases leads from approved firms (firms that have been

reviewed to ensure they remain relevant and compliant).

Insurance Companies. Broadsure Direct will share your information with our panel of approved insurers to obtain quotations for requested policies and appropriate accompanying policies. We also administer claims and general policy changes on the customers and insurers behalf, as well as communicating information requests and receipts between both.

Finance Houses. Broadsure will arrange and administer finance proposals to secure funding upon request for customer's insurance policies, which also aligns with our scope of permission.

Compliance. Broadsure Direct shares information with our compliance consultants (usually by file audits) to determine key performance indicators, amongst other metrics, which relates to the firm's TCF (treating customers fairly) regime.

Solicitors. A firm of solicitors are used to provide customers with accidental management services. Broadsure Direct will not pass your information to the firm of solicitors unless an individual explicitly requests us to. We will administer by leasing between you both when required.

Access to your Information and your Right to be Forgotten

Our customers have the right to request a copy of the information held by Broadsure Direct.

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 or email our compliance officer, info@broadsuredirect.com

Current policy data requests are handled within twenty-four hours, expired policies (within the current business year) may take up to seven days, and all other requests are handled within thirty days.

Retention

All sensitive data that needs to be discarded is separated at the source immediately and is kept in a secured bin that is identified by a colour coded system. These bins are collected daily and are subject to onsite industrial cross shredding. Information from a policy that has been lapsed or cancelled is securely kept for a period of seven years.

How we Update and Remove the Data

Broadsure Direct will review and correct customer data throughout the year and upon renewal. It is the firm's policy to speak to the customer on or around their renewal date. The firm will react immediately when inaccurate data is identified by making amendments to the original source and any third parties that the firm has shared data with. The firm will act quickly to identify and amend these inaccuracies or potential breaches.

Marketing

Verbal consent is obtained when initially speaking to prospective customers, arranging new policies and annually (upon renewal). When given consent, we will also use personal data to send marketing communications for products and services that may be of benefit to the customer. Our customers will decide how they want to be contacted, whether this is by email, phone or text messages, and communication preferences can be updated at any time. Broadsure Direct may also be in contact to update and refresh your communication preferences.

Prospective Customers

To facilitate a quotation and financing for insurance (and associated) products, Broadsure Direct will need to gain clear and verbal consent from the individual before we begin. Broadsure Direct will always gain your consent to contact you in the future where we are unsuccessful with the current years offer. Please notify your telesales person immediately should you not want to receive further contact; for a formal response, 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.

Broadsure Direct will request your consent, annually and throughout the year, to send communications regarding relevant products from our key providers. Please notify your telesales person immediately should you not want to receive further contact; for a formal response, email your request to info@broadsuredirect.com

Website

The firms' only website address is www.broadsuredirect.com. Website forms are used to collect basic quotation information which is then directed to our main office via email. The website is not used to administer insurance contracts, because the firm remains as 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 call us on 01843 594477, or email lynnejacques@broadsuredirect.com

Our website does contain links to third party sites. This Privacy Policy only applies to Broadsure Direct's website; if diverted to another page, individuals should understand that the Privacy Policy may differ.

Cookies

Cookies are files created by websites an individual visits. They make online experiences easier by saving information, which may then be used to track the way a site is being used and visitor behaviour information which can aid statistical reports. You may decide not to accept cookies or to remove cookies entirely from your browser, but in a few cases, our website features may not function as a

result.