

Privacy Policy

HOW WE PROCESS AND MANAGE YOUR DATA:

We are committed to managing and protecting your personal data and as a CFP professional it is important that you know and understand how we do this.

Our privacy policy sets out how we manage your data and we've outlined a brief overview below.

THE INFORMATION WE COLLECT

We process your personal information for the purposes of administering our relationship with you as a CFP professional and to provide you with our services such as managing and recording your events and/or training bookings, communicating with you about our activities and initiatives, and for related purposes.

We collect and store the following personal information which we have grouped together as follows:

- Identity Data (First name, last name, date of birth, gender, company, professional title, professional qualifications)
- Contact Data (Postal address, email address, telephone number)
- Financial Data (We do not store any financial information)
- On occasion, photographers or videographers may capture your image at our events and we will always notify you if we are filming or recording at our events.

HOW WE USE YOUR PERSONAL INFORMATION

As a CFP professional your personal data is processed on the basis of contractual necessity and we require this information to perform our contractual relationship with you. Your personal information, including contact information, is required to provide you with our services and we will not be able to offer our services without it.

The purposes and reasons for processing your personal data are detailed below:

- We collect your personal data for the purposes of administering our contractual relationship with you as a CFP professional
- We collect your personal data for the purposes of sharing information with you about our services and activities without distinction
- We collect and store your personal data as part of our legal / contractual obligations.

SHARING YOUR INFORMATION

Third Parties

We take your privacy seriously and take every reasonable measure and precaution to protect and secure your personal data. We will not, without your consent, supply your data to any third party except where such a transfer is a necessary part of the activities that we undertake. We use third-parties in some circumstances to provide certain services (e.g. Printing of Licences, Administration of

Exams) and third-parties who process your data on our behalf do so in accordance with our strict instructions.

HOW LONG WE KEEP YOUR INFORMATION

We will retain your information for the duration of your CFP professional licence and for a period of six years thereafter. Depending on the nature of any ongoing relationship with you, this period of retention may be subject to change. Upon termination of your licence we will only retain some identity data associated with the granting of your licence (First name, last name, date of birth) for contractual reasons.

FIND OUT MORE

You have many rights under GDPR including the right to access any personal information that we process about you, the right to have any incomplete or inaccurate data to be corrected, as well as the right to request that we delete your information. For further information about our approach to protecting your data, view our [privacy policy](#).