SORBUS
PARTNERS

PRIVACY NOTICE

Protecting your personal data

You may be aware that the new General Data Protection Regulations have come into force in the UK with effect from 25 May 2018. This privacy notice explains how SORBUS Partners LLP use any personal information we collect about you, in compliance with these new regulations.

What information do we collect about you?

We collect information about you when you engage us for investment management, financial planning or financial advisory services. 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 to you.

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 will 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 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 would also be unable to fulfil our legal and regulatory obligations.

Where special category data is required, we will obtain your explicit consent in order to collect and process this information.

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?

We will never share your information for marketing purposes with any other 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 will 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 is necessary for your personal data to be forwarded to a third party, we will use appropriate security measures, such as data encryption or password protection, to protect your personal data in transit.

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 will retain personal data which is necessary to provide services to you. We will take all reasonable steps to keep your personal data up to date throughout our relationship.

We are also subject to regulatory requirements to retain your data for specified minimum periods. These are, generally, five years for investment business, and indefinitely for pension transfers and opt-out 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 is in our legitimate interests to do so. In any case, we will not keep your personal data for longer than seven years after our relationship with you has ended.

You have the right to request deletion of your personal data. We will 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 would 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 will place any updates on this web page when any changes when they occur. This privacy policy was last updated on 25/05/2018.

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 admin@sorbus.com

SORBUS PARTNERS

SORBUS PARTNERS LLP is an award winning multi-family office, founded in 2012 by leading industry professionals.

- We are an award winning partnership dedicated to providing a comprehensive wealth management service.
- We can move with agility but our approach is patient, thoughtful and precise.
- Our partnership structure enables us to focus on the long term interests of our clients.
- Our core values are integrity, honesty and commitment. They underpin all our dealings with clients and key stakeholders.
- We have a commitment to outperform your expectations.

SORBUS PARTNERS is the first multi-family office in the UK to be located and headquartered outside London. Being close to our clients geographically as well as in terms of their values and aspirations is a vital consideration.

In contrast to institutional investors, families often have decentralised and complex decision making processes and multi-generational long-term horizons. We have shaped our partnership and our services with these considerations at the forefront.

Our approach is to work in partnership with families and their key advisers on long-term strategic planning to overcome these difficulties. Our purpose is to give our clients trust and confidence in the stewardship of their wealth.

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