

## Privacy Policy

<b>Policy Number</b>	<b>1.5</b>
<b>Responsible Manager</b>	<b>Colin Frick</b>
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<b>Approved by</b>	<b>Colin Frick</b>
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### Purpose

IFA is committed to protecting the privacy of all clients' personal information. This policy sets out the way:

- personal information is handled
- personal information is disclosed
- personal information is accessed by the individual

In order to deliver training the IFA may need to collect personal information such as name, address, qualifications, work history amongst other information from the client.

### Policy

#### 1. Collection

This will normally be collected directly from the client. However, sometimes it will be collected from third parties nominated by you e.g. referees. Collection will only be by fair and lawful methods.

#### 2. Use and Disclosure

- IFA will endeavour to ensure that personal information remains private and used only for the purposes agree to by the client.
- IFA will only disclose information to a third party with prior permission from the client.
- IFA will not use or disclose client information for direct marketing or unrelated products or services.

#### 3. Information Quality and Security

- IFA will take reasonable steps to ensure that information is up to date, accurate and complete.
- Reasonable steps will be taken to protect personal information from unauthorised access or disclosure.
- Once the information is no longer required, reasonable steps will be taken to destroy it.

#### 2. Access

In order to access personal information, the client needs to put a request in writing.