

## Privacy Notice

Evans Bond Limited (“EBL”) is a Chartered Certified Accounting Firm.

When you request a service we will collect some personal information about you, including: your name, address, contact telephone numbers, email address, date of birth, your sex, source of wealth, tax and social security numbers.

We require this information for a number of different reasons including, communicating with you as we provide our service to you, communication on your behalf with third parties, reporting and research purposes and for marketing and other activities.

EBL has created this privacy statement under the new general data protection regulations 2018. The statement is for your information and it covers how we collect, use, disclose, transfer and store your personal data.

### 1. Introduction and General Terms

EBL is committed to protecting your personal information when you are using our goods and services. We want our services and products to be safe, transparent and reliable. This privacy statement relates to our use of any personal information we collect from you.

It also relates to our use of any personal information you provide to us by phone, SMS, email, and letters and other correspondence and in person.

In order to provide you with the full range of EBL services, we sometimes need to collect information about you. This privacy statement explains following:

- what personal information we collect about you
- how we use information collected about you
- when we use your details to contact you
- under which circumstances we may disclose your personal details to any third party
- your choices around what personal information you provide to us.

EBL is committed to safeguarding your personal information. Whenever you provide such information, we are legally obliged to use your information in line with all applicable laws concerning the protection of personal information, including the General Data Protection Regulations 2018. No system of data storage can be completely secure; if you have any concerns or complaints that your personal data held by EBL could have been compromised: someone could have discovered your personal details held by us, please contact us immediately. Our contact details are at section 14 of the statement.

### 2. What information will EBL collect about me?

When you get in touch with us either via email, a telephone call or when you visit us at our office we will collect some personal information about you. This can consist of information such as your name, email address, postal address, telephone or mobile number, gender and date of birth as well as information collected about the services we provide you.

### 3. How will the EBL use the information collected about me?

EBL will use your personal information for a number of purposes including the following:

- Ensuring we have accurate information so that we may communicate with you and keep you updated of developments as we provide a service to you;
- Ensuring that we have consent and that we hold accurate information so that we may contact you at a future date for the purposes of quality control, surveys or other research purposes and for fundraising and marketing activities;
- Ensuring that we have accurate information for internal reporting, for example, reporting to our director or shareholders, and all reporting to other interested stakeholders.

### 4. When will EBL contact me?

EBL may contact you:

- in relation to any communication we receive from you or any other parties involved in the service we provide for you;
- in respect of any communication necessary to providing you the service we are engaged to provide;
- in relation to any financial questions or issues;
- to invite you to participate in surveys about EBL service; and
- for reporting, research and marketing purposes.

### 5. Will I be contacted for marketing purposes?

EBL will only send you marketing emails or contact you where you have agreed to this by giving us your consent. From time to time we may also contact you and ask your views about the service EBL has provided to you. We may personalise the message content based upon any information you have provided to us.

If you want to stop all personalised messages from EBL, including targeted marketing messages you can contact us at any time and instruct us to stop. We will, of course, stop.

## 6. Will EBL share my personal information with anyone else?

We will keep your information within EBL except where disclosure is required or permitted by law (for example to government bodies and law enforcement agencies), when sharing is required to fulfil the contract between us or where you have consented to sharing your information with other parties involved in the service we provide to you, including, for example, business partners, clients and the income tax office.

Generally, we will use your information within EBL and will only share it outside EBL where you have requested it via a data portability request, or given your consent. EBL requires all third parties to comply strictly with its instructions and EBL requires that they do not use your personal information for their own business purposes and only use your information for reasons associated with the goods or services we provide for you.

## 7. How long will EBL keep my personal information?

We will hold your personal information on our systems for as long as is necessary for the purpose of the supply of goods or services and for any legal requirements. It is anticipated that we will hold your personal information for a period of seven years; this is a legal requirement which we have to meet.

## 8. Can I delete my personal information?

You can always ask for your information to be deleted by the EBL. However, please bear in mind that in some cases we are required to hold your data for a minimum period for legal reasons.

Deleting the data EBL holds about you will raise any personal data we have about you and it will mean any data we hold about you after your request, that we use in future; will be made anonymous.

## 9. Can I find out what personal information EBL holds about me?

Under the general data protection regulations 2018 you have the right to request a copy of the personal information EBL holds about you and to have any inaccuracies corrected. (We require you to prove your identity with two pieces of approved identification). We have a legal duty to supply, correct or delete personal information about you on our files. Please address requests and questions about this or any other question about this privacy statement to the contact detailed in 14.

We will need two copies of forms of identification, which can be:

- passport
- drivers licence
- utility bill (from last three months)

## 10. Web browser cookies

### a) What is a cookie?

A cookie is digital information, which has a unique identifier function that are sent to your computer, tablet or mobile phone (a device) web browser from a website that you visit and are stored on your device. All websites can send cookies to your device web browser if you allow it. Many websites do this in order to track online usage. Similar technologies are also often used within emails.

EBL may use cookies or other unique identifiers when you visit our website.

### b) other information collected from web browsers

your web browser may also provide the information about your device such as an IP address and details about the browser that you are using.

EBL does collect information such as the device you are using, your IP address or the browser you are using.

## 11. Do not track (DNT) browser setting

DNT is a feature offered by some browsers which, when enabled, sends a signal to websites to request that your browsing is not tracked, such as by third-party ad networks, social networks and analytic companies. EBL does respond to DNT requests.

## 12. Changes to EBL privacy statement

This privacy statement may be updated from time to time so you may wish to check it each time you submit personal data to EBL. If you do not agree to any changes, please do not continue to use the EBL website or submit your personal data to EBL. You can also delete your personal data that EBL holds at any time (subject to any legal reasons we may have to keep some of the data we hold about you).

## 13. Sharing of your data with others

Integral to the service that we provide it may be necessary to share data we hold about you with third parties. Before we share any of your personal data we hold about you with any third party we will gain consent of you. If you do not want us to share your personal data with any third party please let us know.

You also have the right to ask us to share your personal data with anyone you wish. To exercise this right to data portability please write to us, giving full details, using the details provided at section 14 of this statement.

## 14. Contacting EBL about this privacy statement

If you have any questions or comments about the EBL privacy statement please contact: The Data Protection Officer, Evans Bond Limited, 18-20 Smith Street, St Peter Port, Guernsey, GY1 2JQ, or email [contact@evansbond.com](mailto:contact@evansbond.com).