Privacy Statement

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Shipman Wealth Management Ltd takes the privacy of personal data seriously - we therefore ask you to please read the following important information which explains how we collect, store and use your personal data.

Shipman Wealth Management Ltd is registered under the Data Protection Act (DPA) 1998. The General Data Protection Regulation (GDPR) has revised provisions of the DPA 1998, and as such our privacy policy has been amended accordingly.

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Who are we?

Shipman Wealth Management Ltd (Company No. 02837635) has its registered office at Ground Floor, Eagle House, 1 Babbage Way, Exeter Science Park, Exeter, Devon, England, EX5 2FN. Our phone number is 01392 211800 and the data protection email address is [info@shipmanwm.co.uk](mailto:info@shipmanwm.co.uk).

Information we collect  
Information we collect includes both information you knowingly and actively provide us when using or participating in any of our services and promotions, and any information automatically sent by your devices in the course of accessing our products and services.

Log data  
When you visit our website, our servers may automatically log the standard data provided by your web browser. It may include your device’s Internet Protocol (IP) address, your browser type and version, the pages you visit, the time and date of your visit, the time spent on each page, other details about your visit, and technical details that occur in conjunction with any errors you may encounter.

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Please be aware that while this information may not be personally identifying by itself, it may be possible to combine it with other data to personally identify individual persons.

Personal information  
We may ask for personal information which may include one or more of the following:

Name

Email

Date of birth

Phone/mobile number

Home/mailing address

Legitimate reasons for processing your personal information  
We only collect and use your personal information when we have a legitimate reason for doing so. In which instance, we only collect personal information that is reasonably necessary to provide our services to you.

Collection and use of information  
We may collect personal information from you when you do any of the following on our website:

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* Sign up to receive updates from us via email
* Use a mobile device or web browser to access our content
* Contact us via email or on any similar technologies

We may collect, hold, use, and disclose information for the following purposes, and personal information will not be further processed in a manner that is incompatible with these purposes:

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to enable you to customise or personalise your experience of our website

to contact and communicate with you

Please be aware that we may combine information we collect about you with general information or research data we receive from other trusted sources.

Security of your personal information  
When we collect and process personal information, and while we retain this information, we will protect it within commercially acceptable means to prevent loss and theft, as well as unauthorized access, disclosure, copying, use, or modification.

Although we will do our best to protect the personal information you provide to us, we advise that no method of electronic transmission or storage is 100% secure, and no one can guarantee absolute data security. We will comply with laws applicable to us in respect of any data breach.

You are responsible for selecting any password and its overall security strength, ensuring the security of your own information within the bounds of our services.

How long we keep your personal information  
We keep your personal information only for as long as we need to. This time period may depend on what we are using your information for, in accordance with this privacy policy. If your personal information is no longer required, we will delete it or make it anonymous by removing all details that identify you.

However, if necessary, we may retain your personal information for our compliance with a legal, accounting, or reporting obligation or for archiving purposes in the public interest, scientific, or historical research purposes or statistical purposes.

Children’s privacy  
We do not aim any of our products or services directly at children under the age of 13, and we do not knowingly collect personal information about children under 13.

Disclosure of personal information to third parties  
We may disclose personal information to:

* a parent, subsidiary, or affiliate of our company
* third party service providers for the purpose of enabling them to provide their services, for example, IT service providers, data storage, hosting and server providers, advertisers, or analytics platforms
* our employees, contractors, and/or related entities
* our existing or potential agents or business partners
* sponsors or promoters of any competition, sweepstakes, or promotion we run
* courts, tribunals, regulatory authorities, and law enforcement officers, as required by law, in connection with any actual or prospective legal proceedings, or in order to establish, exercise, or defend our legal rights third parties, including agents or sub-contractors, who assist us in providing information, products, services, or direct marketing to you third parties to collect and process data

International transfers of personal information  
The personal information we collect is stored and/or processed where we or our partners, affiliates, and third-party providers maintain facilities. Please be aware that the locations to which we store, process, or transfer your personal information may not have the same data protection laws as the country in which you initially provided the information. If we transfer your personal information to third parties in other countries: (i) we will perform those transfers in accordance with the requirements of applicable law; and (ii) we will protect the transferred personal information in accordance with this privacy policy.

Your rights and controlling your personal information  
You always retain the right to withhold personal information from us, with the understanding that your experience of our website may be affected. We will not discriminate against you for exercising any of your rights over your personal information. If you do provide us with personal information you understand that we will collect, hold, use and disclose it in accordance with this privacy policy. You retain the right to request details of any personal information we hold about you.

If we receive personal information about you from a third party, we will protect it as set out in this privacy policy. If you are a third party providing personal information about somebody else, you represent and warrant that you have such person’s consent to provide the personal information to us.

If you have previously agreed to us using your personal information for direct marketing purposes, you may change your mind at any time. We will provide you with the ability to unsubscribe from our email-database or opt out of communications. Please be aware we may need to request specific information from you to help us confirm your identity.

If you believe that any information we hold about you is inaccurate, out of date, incomplete, irrelevant, or misleading, please contact us using the details provided in this privacy policy. We will take reasonable steps to correct any information found to be inaccurate, incomplete, misleading, or out of date.

If you believe that we have breached a relevant data protection law and wish to make a complaint, please contact us using the details below and provide us with full details of the alleged breach. We will promptly investigate your complaint and respond to you, in writing, setting out the outcome of our investigation and the steps we will take to deal with your complaint. You also have the right to contact a regulatory body or data protection authority in relation to your complaint.

Use of cookies  
We use “cookies” to collect information about you and your activity across our site. A cookie is a small piece of data that our website stores on your computer, and accesses each time you visit, so we can understand how you use our site. This helps us serve you content based on preferences you have specified.

The following cookies are used by Shipman Wealth Management

XSRF-TOKEN  - Used for security reasons

bSession   - Used for security & anti-fraud reasons

fedops.logger.defaultOverrides   - Used for stability/effectiveness measurement

hs   - Used for security reasons

ssr-caching   - Used to indicate the system from which the site was rendered

svSession   - Used in connection with user login

We also use a third type of cookies on our website to improve our products and services. In particular, we use the following cookies:

TS\*  - Used for Session, Security

TS01\*\*\*\*\*\*  - Used forSession, Security

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You can control and manage cookies in various ways. Please keep in mind that removing or blocking cookies can negatively impact your user experience and parts of our website may no longer be fully accessible.

For more information on how to modify your browser settings or how to block, manage or filter cookies can be found in your browser’s help file or through such sites as [www.allaboutcookies.org](http://www.allaboutcookies.org/)

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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

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Marketing

We’d like to send you information about our products and services and those of other companies in our group which may be of interest to you. If you’ve agreed to receive marketing information, you may opt out at a later date.

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You have a right at any time to stop us from contacting you for marketing purposes or giving your information to other members of the group. If you no longer wish to be contacted for marketing purposes, please contact us by email or post, or by clicking here.

Limits of our policy  
Our website may link to external sites that are not operated by us. Please be aware that we have no control over the content and policies of those sites, and cannot accept responsibility or liability for their respective privacy practices.

Changes to this policy  
At our discretion, we may change our privacy policy to reflect updates to our business processes, current acceptable practices, or legislative or regulatory changes. If we decide to change this privacy policy, we will post the changes here at the same link by which you are accessing this privacy policy.

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If required by law, we will get your permission or give you the opportunity to opt in to or opt out of, as applicable, any new uses of your personal information.

Contact us  
For any questions or concerns regarding your privacy, you may contact us using the following details:

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Shipman Wealth Management

Eagle House

1 Babbage Way

Exeter Science Park

Exeter

Devon

England

EX5 2FN