



## Register of data controllers

### Entry details

**Organisation name** : The Adviser Support Hub Limited

**Registration reference** : Z1930307

**Date registered** : 25 September 2009

**Registration expires** : 24 September 2018

### Organisation Address

51 Trinity Row  
South Woodham Ferrers  
Chelmsford  
CM3 5DE

**Companies House registration number:** 5581826

### Nature of work description

**Nature of work - Financial, Mortgage and Insurance Services**

#### Description of processing

The following is a broad description of the way this organisation/data controller processes personal information. To understand how your own personal information is processed you may need to refer to any personal communications you have received, check any privacy notices the organisation has provided or contact the organisation to ask about your personal circumstances.

#### Reasons/purposes for processing information

We process personal information to enable us to act as an intermediary for any financial transactions including mortgage and insurance broking, and debt administration to our clients; promote our goods and services; maintain our own accounts and records and to support and manage our staff.

#### Type/classes of information processed

We process information relevant to the above reasons/purposes. This may include:

- personal details
- family details
- lifestyle and social circumstances
- financial details
- employment and education details
- goods or services provided

We also process sensitive classes of information that may include:

- physical or mental health details
- racial or ethnic origin
- religious or other beliefs
- trade union membership
- offences and alleged offences

### **Who the information is processed about**

We process personal information about:

- clients
- suppliers
- professional advisers and consultants
- enquirers, complainants
- employees

### **Who the information may be shared with**

We sometimes need to share the personal information we process with the individual themselves and also with other organisations. Where this is necessary we are required to comply with all aspects of the Data Protection Act (DPA). What follows is a description of the types of organisations we may need to share some of the personal information we process with for one or more reasons.

Where necessary or required we share information with:

- current, past or prospective employers
- family, associates and representatives of the person whose personal data we are processing
- financial organisations
- business associates and professional advisers
- educators and examining bodies
- employment and recruitment agencies
- healthcare and welfare organisations
- credit reference agencies
- debt collection and tracing agencies
- other companies in the same group
- suppliers and services providers
- trade and employer associations

- central government
- law enforcement and prosecuting authorities
- ombudsmen and regulatory authorities
- traders in personal data
- courts and tribunals

### **Trading and sharing personal information**

Personal information is traded and shared as a primary business function. For this reason the information processed may include name, contact details, family details, financial details, employment details, and goods and services. This information may be about customers and clients. The information may be traded or shared with business associates and professional advisers, agents, service providers, customers and clients, and traders in personal data.

### **Providing financial services and advice**

Personal information is also processed in order to provide financial services and advice. For this reason the information processed may include name, contact details, family details, lifestyle and social circumstances, financial details, goods and services and sensitive classes of information that may include physical or mental health details. This information may be about clients, family and associates of clients, suppliers and enquirers. Where necessary or required this information is shared with the data subjects themselves, professional advisers and consultants, services providers, credit reference agencies.

### **Undertaking research**

Personal information is also processed in order to undertake research. For this reason the information processed may include name, contact details, family details, lifestyle and social circumstances, financial details, goods and services. The sensitive types of information may include physical or mental health details, racial or ethnic origin and religious or other beliefs. This information is about survey respondents. Where necessary or required this information may be shared with customers and clients, agents, service providers, survey and research organisations.

### **Consulting and advisory services**

Information is processed for consultancy and advisory services that are offered. For this reason the information processed may include name, contact details, financial details, and the goods and services provided. This information may be about customers and clients. Where necessary this information is shared with the data subject themselves, business associates and other professional advisers, current, past or prospective employers and service providers.

### **Transfers**

It may sometimes be necessary to transfer personal information overseas. When this is needed information may be transferred to countries or territories around the world. Any transfers made will be in full compliance with all aspects of the data protection act.

**End of Report**