



Edward Paul Financial Planning Ltd

Marketing Customer Consent Form

Edward Paul Financial Planning Ltd (our Firm), is a Company Registered in England and Wales whose Company Registration Number is 08951069.

Why are we asking you to read and complete this Marketing Customer Consent?

As a valued customer, we would like to provide you with reassurance that we take your right to privacy in an electronic context seriously.

During the course of providing you with our service, this Firm may be in contact with you through a variety of means, including potentially by post, telephone, email, SMS and instant messaging services (such as WhatsApp). These means are referred to in this document as **Marketing**.

We would like to take particular care to ensure that any marketing or promotional information that we may send to you, is done so with your prior, express permission. We would like to keep you informed about products or services that we, or selected third parties, may have access to that may be of interest to you.

In this document, we explain how we would do this, and ask for your consent to receiving such information from us in the future.

How this Marketing Consent relates to our Customer Privacy Notice

During the course of dealing with us we will ask you to provide us with detailed personal information relating to your existing circumstances, your financial situation and, in some cases, your health and family health history (**Your Personal Data**).

During the course of our initial discussions with you, you will have been provided with a copy of, or been provided with access to, our **Customer Privacy Notice**. We encourage you to read this document, as it sets out in detail the basis upon which this Firm will process and share Your Personal Data.

Our Customer Privacy Notice does not extend to explaining how we would like to use Your Personal Data for marketing purposes, including to Market to you. We are of the view that this is better set out separately, to enable you to be clear and make informed decisions in relation to your right to privacy.

Tel: 01702 335999

www.edwardpaul.co.uk

Email: info@edwardpaul.co.uk

Registered Address

First Floor | 617-619 London Road | Westcliff on Sea | Essex | SS0 9PE

Registered in England & Wales number: 08951069

Authorised and Regulated by the Financial Conduct Authority.



How we will use Your Personal Data in the future

There are a range of reasons why we need to retain Your Personal Data and, when necessary, use it to make contact with you. These include:

- asking your views on the quality of the service we have provided
- responding to your own questions on the product you have taken out
- informing you with regard to any changes to the terms and conditions of your products proposed or made by mortgage lenders / finance providers / insurance providers / investment providers

Specifically, we would also like to make you aware of products or services that are made available to our firm from time to time that we think may be of interest to you in the future. We propose to do this by any of the Marketing means, using contact information you have provided to us.

Marketing Consent

I/We hereby grant **Edward Paul Financial Planning Ltd** permission to process my personal data for the purpose of Marketing. By providing your consent, you agree that you have given your express permission for us to market you regarding products and services that we think may be of interest to you and by any means of communication that is suitable at the time.

IMPORTANT NOTES: Marketing by our Firm

If you do not indicate your agreement for **us** to make contact with you, we may be unable to provide you with details of products and/or services that may suit your needs and circumstances.

We would like to maintain a record of your express consent for **us** to contact you by post, telephone, SMS, email and instant messaging for marketing our products or services that we think may be of interest to you. Please indicate your consent to **us** contacting you by any of the means specified below:

Post

Phone

SMS

Email

Instant Messaging*

*Whatsapp or similar service.

Signature:

Date:

Signature:

Date:



Your right to Opt-Out

You have the right to ask us not to contact you for marketing purposes at any time - to Opt Out – we have included details of how to Opt Out at the end of this document so that you know what to do.

Opting Out means that we will either remove Your Personal Data from our marketing database or limit our contact with you to the means you specify (for example, by email only), but we reserve the right to retain it for any other purpose explained in this document or as set out separately in our Customer Privacy Notice.

How to make contact with our Firm to Opt Out

If you have any questions or comments about this document, or wish to make contact in order to Opt Out please contact:

Amanda Colgate

Tel: 01702 335999

Email: amanda@edwardpaul.co.uk

Address: First Floor 617-619 London Road Westcliff on Sea Essex SS0 9PE

If you have any concerns or complaints as to how we have handled Your Personal Data or you may lodge a complaint with the UK's data protection regulator, the ICO, who can be contacted through their website at <https://ico.org.uk/global/contact-us/> or by writing to Information Commissioner's Office, Wycliffe House, Water Lane, Wilmslow, Cheshire, SK9 5AF.