



THE UKGDPR AND THE DATA PROTECTION ACT 2018

EMPLOYEE DSAR FORM



QUILTER CHEVIOT
INVESTMENT MANAGEMENT

About the UKGDPR and The Data Protection Act 2018

The UKGDPR and The Data Protection Act 2018 give you, as the Data Subject (or your appointed representative¹) certain rights to find out what information about you any organisation holds. Specifically, you have the right to obtain: -

- Confirmation that Quilter Cheviot (QCL) are processing your data;
- Details of how QCL use your data, including: -
 - details of the how & why QCL processes your personal data;
 - details of any 3rd Parties that QCL share your data with and why your data is shared;
 - details of consent you have provided for QCL to use your data for other purposes (e.g. to receive marketing material);
 - details of the categories of data QCL hold (e.g. personal and/or special category data);
 - details of QCL's data retention policy (i.e. how long we will hold your data for and how we will dispose of it after that time).
- Access to your personal data; and
- Other supplementary information.

Furthermore, you have the right: -

- To request that QCL delete any of your personal data that we hold (subject to conditions)
- To request that QCL rectify any errors in the personal data that we hold about you
- To revoke or restrict any consent that you may have given for the usage of your personal data (e.g. to receive marketing material).
- To make a complaint to the Information Commissioner's Office (ICO) if you are unhappy with the way QCL are handling or processing your personal data. Details of how to contact the ICO can be seen by clicking [here](#).

We at QCL will provide you with all the information that you need to enable you to exercise any of these rights.

For further information about your rights and QCL's responsibilities under the UKGDPR and the Data Protection Act 2018, please click [here](#) to read QCL's Privacy Notice.

If you would like to proceed with your Data Subject Access Request, please complete the following questionnaire. This will guide you to give us all the information we need to fulfil your request.

¹ Appointed representatives will need to provide a signed authority from the Data Subject. This may be scanned and attached to the online form.

About you

Please answer the following questionnaire about yourself. This will allow QCL to identify your data:

Name:

Previous name (if it has changed since QCL may have processed your data):

Your address:

Postcode:

Previous address (if it has changed since QCL may have processed your data):

Postcode:

Please indicate how you would like us to contact you:

- By post
 By email
 By phone

Your email address (only provide this information if you would like us to contact you by email):

Your phone number (only provide this information if you would like us to contact you using this phone number):

Your mobile number (only provide this information if you would like us to contact you using this phone number):

If you are the Data Subject's Appointed Representative, please provide the data subject's authority to act on their behalf here (Please note that your authority to act on behalf of the data subject will be validated before any information is sent to you):

About your employment with Quilter Cheviot

Does this Data Subject Access Request relate to your employment with Quilter Cheviot?

Are you currently employed by Quilter Cheviot?

If not, please provide the start and end dates of your employment with Quilter Cheviot?

From To

Please provide your Staff Number (if known):

Please provide details of your Business Unit, Department, Office Location, your Job Title, your Grade & your Line Manager(s):

About your data

Please complete the following questionnaire. This will allow QCL to provide you with all the information that you need.

I confirm that I would like QCL to state whether or not they are currently processing my personal data

Please let us know if you only require data relating to a specific role:

Please let us know if you only require data relating to a specific time period:

Details of telephone conversations (please tick):

If known, please select the date range for the calls:

From To

Details of email exchanges (please tick):

If known, please provide the date range for the emails:

From To

Please provide any additional information that you think will help us provide all the data that you are seeking:

About your Services

I would like details of my personal data that QCL hold in the following categories:

Please let us know if you only require data relating to a specific service:

Please let us know if you require data relating to any of the other Quilter companies:

(e.g. Quilter Financial Planning, Quilter Financial Advisers, Quilter Investors etc)

Account Data (please tick):

If known, please provide the account number(s) for which you need information:

Details of telephone conversations (please tick):

If known, please select the date range for the calls:

From To

Details of email exchanges (please tick):

If known, please provide the date range for the emails:

From To

Please provide any additional information that you think will help us provide all the data that you are seeking:

Once you have completed the form, please forward it to us through one of the below methods;

By email: GDPR@quiltercheviot.com

By post: Care of Data Guardian
Quilter Cheviot Limited
Senator House
85 Queen Victoria Street
London
EC4V 4AB

We will send a confirmation by way of your preferred contact method.

If you are unable to submit your request through one of the above channels, please speak to your Investment Manager who will be happy to assist you.

Please note that to protect the privacy of your information; QCL will contact you to validate your identity before any information is made available.

QUILTER CHEVIOT

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w: quiltercheviot.com

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