

# Privacy Notice for Beyond Paraplanning & Intelligent Adviser Solutions

## 1. Introduction

We value your privacy. This privacy notice explains how we collect, store, and use personal data when we provide paraplanning and consultancy services to financial advisers and their clients.

## 2. Data Controller and Processor

Beyond Paraplanning & Intelligent Adviser Solutions acts as a data processor. The financial adviser engaging our services is the data controller and is responsible for ensuring they have the appropriate legal basis to provide us with client data.

## 3. Data Collection

We collect only the data necessary to fulfill our services, which may include:- Personal information (name, financial data, etc.) shared by advisers for the creation of reports or suitability letters.

## 4. How We Use Your Data

We use personal data solely to:- Provide paraplanning and consultancy services to the adviser.- Communicate with the adviser regarding the services.

## 5. Data Sharing and Third-Party Services

We may share personal data with trusted third-party services such as:- Cloud storage or email providers. All third-party providers are GDPR-compliant and process data only to fulfill the agreed services.

## 6. Data Retention

We retain personal data only for as long as required to complete the services. Data will be securely deleted or anonymized when it is no longer necessary.

## 7. Your Rights

As a data processor, we assist advisers in responding to requests from clients wishing to exercise their GDPR rights (such as the right to access or delete data). Clients should direct these requests to the adviser directly.

## 8. Security

We implement robust security measures to protect personal data from unauthorized access and use. All data is stored securely and encrypted where necessary.

## 9. Contact Information

For more information about our data practices or if you wish to request access to your data, please contact us:

Email: [hello@beyondparaplanning.co.uk](mailto:hello@beyondparaplanning.co.uk)

Website: [www.beyondparaplanning.co.uk](http://www.beyondparaplanning.co.uk)