



Privacy Statement

Information we hold about you

In order to advise you properly, we must obtain certain information from you about your financial and personal circumstances.

By providing us with your personal data:

1. You agree that the information we hold about you can be held on computer and/or paper files.
2. You agree that any information that you give us, including sensitive personal data such as health and medical records, may be disclosed to appropriate third parties for the purpose of processing your application and for the ongoing administration of your investment or policy.
3. We will undertake that any information will only be held as long as is necessary to ensure our obligations to you are met.
4. For further information regarding data protection and records please refer to our Terms of Business
5. Should you wish to obtain a copy of the personal data we hold about you please write to Compliance Officer at Advice on Care, 8A Richfield Avenue, Reading Berkshire RG1 8EQ. We reserve the right to charge you a fee of £10 to cover administration.

Please note: All information sent to us via the enquiry forms on our website is processed by a secure server.

Yours sincerely,

Keith Hargraves BA (Hons), Cert PFS
Principal

8a Richfield Avenue, Reading RG1 8EQ
Tel: 0118 958 5571 Fax: 0118 958 8431 Mobile: 07789 484 808 E-mail: enquiries@adviceoncare.co.uk

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Principal – Keith Hargraves

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