



## Data subject access request

*This form is for you, or someone you have authorised to represent you, to request a copy of the personal information we hold about you.*

You have the right to get a copy of information that is held about you. This is known as a 'data subject access request' or 'DSAR' and for the purposes of this you are referred to as the 'data subject'.

Whenever personal data is processed, collected, recorded, stored or disposed of it must be done within the terms of Data Protection Legislation. This sets out your rights regarding your personal information, and how you can access that information from organisations that hold it. The General Data Protection Regulation reinforces the rules that currently exist to protect your personal information.

We will provide you with all the information you need to enable you to exercise any of your individual General Data Protection Regulation rights as a data subject.

### **What are your rights?**

The General Data Protection Regulation gives you the right to obtain the following.

- ▶ Confirmation that Quilter is holding your data;
- ▶ Details of how Quilter uses your data, including:
  - how and why Quilter processes your personal data;
  - details of any third parties that Quilter shares your data with and why your data is shared;
  - details of the categories of data Quilter holds including personal and/or Special Category/Sensitive data details of how long we will hold your data for and how we will dispose of it after that time under our Data Retention Policy.
- ▶ Access to your personal data and other supplementary information.

### **It also gives you the following rights:**

- ▶ To request that Quilter deletes any of your personal data that we hold, subject to conditions.
- ▶ To request that Quilter rectifies any errors in the personal data that we hold about you.
- ▶ To raise a complaint about how we have handled your personal data, you can contact our Data Protection Officer who will investigate the matter at the address below:

The Data Protection Officer, Senator House, 85 Queen Victoria Street, London, EC4V 4AB.

If you are not satisfied with our response or believe we are not processing your personal data in accordance with the law you can make a complaint to our regulator in respect of data protection the Information Commissioners Office (ICO). Information about the ICO can be found at: The Information Commissioner's Office (ICO) <https://ico.org.uk/global/contact-us/>

### *Making a data subject access request*

To make your Data Subject Access Request, please complete this form, giving us the information we need to fulfil your request.



*Important information about completing this form:*

If you are not the person whose data is being requested (the 'data subject') and you are completing this form as their representative, please provide the data subject's name, address and date of birth, together with your own details on the next pages.

Please note that we will need to validate your authority to represent the data subject and make this request before we can send any information to you.

Providing specific information about the data you require will help us process your request faster.

Please indicate how you would like us to contact you: By courier post  By secure email\*

*\* If you wish us to use email to correspond and issue data please note that this will be sent using the Quilter encryption system for securing data. Please complete the email address details on this page.*

*Data subject's details*

If a joint policy is held please ensure both policyholders' complete this section

**First policyholder**

Data Subject's name

Data Subject's previous name (should this have changed since you last contacted us)

Data Subject's address   
 Postcode  Country

Data Subject's previous address (should this have changed since you last contacted us)   
 Postcode  Country

Data Subject's telephone number

Data Subject's email address (only provide this if you want us to contact you by email)

Data Subject's date of birth\*

Data Subject's National Insurance number\* (if applicable)

*\* Please note that this information will be used to identify you as the data subject  
Please complete this if submitting a postal request*

I authorise Quilter to complete a Data Subject Access Request and provide the information requested below:

Please sign



## Second policyholder (where applicable)

Data Subject's name

Data Subject's previous name  
(should this have changed since you last contacted us)

Data Subject's address

Postcode	Country
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Data Subject's previous address  
(should this have changed since you last contacted us)

Postcode	Country
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Data Subject's telephone number

Data Subject's email address  
(only provide this if you want us to contact you by email)

Data Subject's date of birth\* 

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Data Subject's National Insurance number\* (if applicable)

\* Please note that this information will be used to identify you as the data subject

Please complete this if submitting a postal request

I authorise Quilter to complete a Data Subject Access Request and provide the information requested below:

Please sign

## Representative contact details

Only provide this information if you are acting on behalf of the data subject

Representative's name

Representative's telephone number

Representative's address  
(if different from the Data Subject's address)

Postcode	Country
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Representative's email address  
(only provide this if you want us to contact you by email)

Please arrange for the Data Subject to complete this. Please include the second Data Subject if the policy is in joint names. If submitting this request by email we will need to contact you separately for the policyholder's signed authority.

I authorise Quilter to complete a Data Subject Access Request and provide the information requested below:

First Data Subject's authority  
(Please sign)

Second Data Subject's authority  
(where applicable):  
(Please sign)



## About the data you are requesting

Please complete the following to indicate what data is required about you/the Data Subject.

Please tick all boxes that are applicable

I would like details of my/the Data Subject's personal data that Quilter holds in the following categories:

- ▶ Data relating to a specific product held by you/the Data Subject

(For example Pension, Bond, ISA, Life Insurance products)

Please specify here

- ▶ Data relating to a specific Quilter group company

(For example Quilter, Quilter Investors, Quilter International)

Please specify here

- ▶ Data about a specific policy

(Please provide the policy number(s) for which you would like information)

Please specify here

Please tick one or more of the below boxes indicating the specific data you require:

- ▶ Details of our telephone conversations with you/the Data Subject

(Please provide any known telephone numbers we may have been in contact on)

Please specify here

- ▶ If known, please select the date range for the calls

From

To

- ▶ Details of our written correspondence with you

(If known, please provide the date range for the correspondence)

From

To

### Note

Please note that if you do not indicate any of the above we will send a copy of all written correspondence and data held on our administration system(s).

- ▶ Any additional information that you think will help Quilter to provide all the data that you are seeking



Once the form has been completed it can be submitted by emailing it to [customerprivacy@quilter.com](mailto:customerprivacy@quilter.com) or posting it to:

Data Controller  
Quilter  
Quilter House  
Portland Terrace  
Southampton  
Hampshire SO14 7EJ.

To protect the privacy of your information, we may need to contact you to validate your identity before we make any information available.

**Important note if you wish to submit your Data Subject Access by email:**

The Data Subject Access Request form contains your personal identifiable data. In order to protect your data, it should only be sent to us via secure or encrypted email.

[platform.quilter.com](https://platform.quilter.com)

*Please be aware that calls and electronic communications may be recorded for monitoring, regulatory and training purposes and records are available for at least five years.*

*Quilter is the trading name of Quilter Investment Platform Limited which provides an Individual Savings Account (ISA), Junior ISA (JISA) and Collective Investment Account (CIA) and Quilter Life & Pensions Limited which provides a Collective Retirement Account (CRA) and Collective Investment Bond (CIB).*

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