

Personal Data Retention: supplementary to privacy notices

Quilter group entities will retain personal data only for as long as there exists a reasonable business requirement or longer only where there is a legal or regulatory obligation to do so. We have set out below our current retention periods together with examples of how they apply. These periods will be reviewed from time to time.

Data when in active use is not subject to a retention period limit. Active use means, for example, while you are still a customer of a Quilter business or a user of a Quilter product or service.

Each retention period is therefore the period of time that the data will be retained after the last active use. At the end of the retention period the data will be destroyed, deleted or anonymised (this means that the data can never be linked or traced to any individual) depending on the storage media and the technology available at that time.

If you have any questions about the retention of data please contact the Quilter Group Data Protection Officer by email at GDPO@quilter.com

Category of Data	Examples	Retention Period
Client Data	Your name and contact details; an account or policy number.	<ul style="list-style-type: none"> • 20 years <ul style="list-style-type: none"> ○ Please note that after 7 years you may if you wish exercise your right to request erasure. There may from time to time be pros and cons associated with erasure which we will discuss with you at the time of request.
Client Advice Data	Fact find documents; risk questionnaires.	<ul style="list-style-type: none"> • 50 years
Pension Transfer Records	Advice regarding transferring from one provider to another; suitability notes.	<ul style="list-style-type: none"> • Indefinitely <ul style="list-style-type: none"> ○ Please note that this is in line with a Financial Conduct Authority (“FCA”) ruling and is subject to review by the FCA.
Prospective Client Data	Enquiry notes; application forms.	<ul style="list-style-type: none"> • 1 year
Adviser Personal Data	Name and contact details of your financial adviser.	<ul style="list-style-type: none"> • 7 years
Marketing Opt Out Information	Records of when you have declined to receive marketing content to ensure that we do not contact you inappropriately	<ul style="list-style-type: none"> • Indefinitely <ul style="list-style-type: none"> ○ Please note if you have requested that your information be erased. Quilter will not keep a record that you declined marketing and so you risk future contact, should your details appear in marketing lists.