

## LifeQuote – Customer Privacy Notice

### Your data and what we use it for

'LifeQuote' is a trading name of Direct Life and Pension Services ('us'), who provide a life insurance quote and apply service for Financial Advisers.

If you decide to apply for a product or service offered by us, you may be asked to provide additional personal details to those already provided to us by your adviser, including details that are classed as "sensitive", such as your medical history.

Your details will be used by us to process and administer your application for insurance cover on behalf of your adviser, who has provided consent for your data to be used in this way, and will be disclosed to the provider of any insurance product you purchase in order that they may administer the policy.

We may share your personal data with specialist suppliers to provide elements of our service. They will not use your data for any other purpose and data will be held securely in line with our contract with them.

### How long we will keep your data for and how we will protect it

We will retain personal data relating to a quote which does not result in an application for no longer than one year.

If you apply for life insurance, we will retain personal and sensitive data for six years (or longer if requested to do so by the regulator) for monitoring, compliance and to support your application and any subsequent enquiries. This will help us answer any enquiries from you, your adviser or the chosen Insurer. After this period, all sensitive data will be deleted and basic personal data retained to answer future enquiries about the status of an application.

If a policy is put in force, for your protection and in the event of future claims or queries, we will securely retain all personal data relating to that application for a period of 50 years from the date it went on risk.

Data will be processed in a manner that ensures appropriate security of the personal data, including protection against unauthorised or unlawful processing and against accidental loss, destruction or damage, using appropriate technical or organisational measures.

### Your data rights and our obligations to you

You may ask us for a copy of the information we hold about you. To request a copy of the information we hold, please contact us at the address below. This includes the transfer of information to another organisation if feasible.

If any information we hold is inaccurate, you may ask us to rectify any inaccuracy and we will inform any third parties to whom the data has been provided.

In specific circumstances, you can ask us to delete information we hold. This will depend on the consent already provided to us and the status of the application. You can also object to, or ask us to restrict, the processing of your data.

You have the right to withdraw consent at any time. Please contact your adviser or us immediately should you wish to do so.

If you are unhappy with the handling of your personal data, you have the right to refer the matter to the Information Commissioners Office who will thoroughly investigate your concerns.

They are contactable on 0303 123 1113 or go to [www.ico.org.uk/concerns/handling](http://www.ico.org.uk/concerns/handling) for more information. Please however contact us in the first instance as we may be able to resolve the issue directly.

### **How to contact us**

In the event of any queries, please contact us at:

Direct Life and Pension Services Ltd,  
Second Floor, Centre & Right Wing  
52 Westgate  
Chichester,  
West Sussex,  
PO19 3HF  
or call 0800 652 9754

The LifeQuote/Direct Life and Pension Services Ltd Data Protection Officer is Andrew Dalton, Head of Enterprise Risk and Information Governance.