



Privacy Statement

General Data Protection Regulations

Richard Wood

CALLAHAN INSURANCE BROKERS LIMITED

General Data Protection Regulation Privacy Statement

Callaghan Insurance Brokers Limited (“we”, “our” or “us”) act as Data Controller. We may store your information on a computer and on physical files. How we use and look after your personal information is set out below.

When we provide services to our clients (“you”), we collect and process certain information. This information includes personal information capable of identifying, or relating to, an individual.

The following are the legal basis under which we process this personal information. In most cases it will be one of the following or a combination of them depending on individual circumstances:

- ✧ To fulfil our contractual obligations to our clients;
- ✧ For our legitimate interests and the legitimate interests of our clients, to provide services to our clients and to maintain communications with the client regarding the services; and
- ✧ To comply with our legal and professional obligations, such as due diligence and reporting obligations.

We collect personal information through our proposal forms, directly from the client or from their representatives. If you are providing us with personal information about someone other than yourself, we ask that you make sure they are aware they are doing so, and that they are made aware of this privacy notice.

We may collect the following personal information:

- ✧ Names, addresses, date of birth, email addresses and other contact information;
- ✧ Residency information;
- ✧ Identification documents;
- ✧ Information about family members;
- ✧ Previous convictions;
- ✧ Medical or health information;
- ✧ Any other information as required by the type of policy the client is obtaining or any anti-money laundering regulations.

We use your personal information in the following ways:

- ✧ To provide the services and fulfil our contractual obligations with you;
- ✧ To obtain quotes for insurance as requested by you;
- ✧ To handle queries and complaints from you;
- ✧ To conduct due diligence which may be required to comply with anti-money laundering and industry regulations;
- ✧ For direct marketing purposes;
- ✧ To exercise, defend or protect our legal rights or your rights or third parties; and
- ✧ To comply with legal and professional obligations and to co-operate with the regulatory bodies.

We may have to provide information to third parties under the following circumstances:

- ✧ To intermediaries, insurers, advisers and business partners for the purpose of fulfilling our contractual obligations and deliver our services;
- ✧ To any law enforcement body, regulator, court, government department or professional body if we were obliged to disclose your personal information under applicable laws and regulations, which may include laws outside your country of residence;
- ✧ To any third-party purchaser, seller, investor or partner in the event of any reorganisation, merger, sale, joint venture, assignment, transfer or other disposition of all or any portion of our business, assets or stock.

Appropriate, reasonable steps will be taken to ensure that adequate security measures and confidentiality undertakings are in place to protect the information shared.

We maintain appropriate security measures to protect the confidentiality and security of your personal data against misuse, unauthorised access, disclosure or alteration. These measures are reviewed on a regular basis.

We are responsible for the personal information we process.

We will keep your information so long as a relationship exists between you and us, for us to meet our contractual obligations with you. After our relationship terminates, we will keep the information the information for a maximum of 5 years thereafter as required by our regulators.

If you would like to examine, correct, update, object to or restrict the processing of your personal information or request a copy of the personal information, please contact us using the details below.

You have the right to make a complaint to the Gibraltar Regulatory Authority.

If you receive direct marketing from us, you have the right, at any time, to request that we cease sending you direct marketing. To exercise this right please contact us using the details provided below.

We would like to remind you of your rights, as a Data Subject, under the General Data Protection Regulations. These are:

1. Your right of access to your information;
2. Your right to request for your information to be rectified;
3. Your right to request for your information to be erased;
4. Your right to request for restrictions to the collection and/or use of your information;
5. Your right to object to the collection and/or use of your information and
6. Your right to data portability.

Contact Information

For any matters relating to the information in this Privacy notice please contact us at:

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