



**Premier Choice Group**

Personal Health | Group Health | Business Protection | Group Risk

 **Brown & Brown**  
EUROPE

## Privacy Statement for Portman Health and Protection Ltd.

At Portman Health and Protection Ltd. we take your privacy seriously. This Privacy Statement explains how we collect, use, and protect your personal data in compliance with the UK General Data Protection Regulation (UK GDPR), the Data Protection Act 2018, and other applicable laws. As an appointed representative of [Brown & Brown](#), we operate under their regulatory authority as authorised by the Financial Conduct Authority (FCA).

### Who We Are

Portman Health and Protection Ltd. is an appointed representative of Brown & Brown, a company authorised and regulated by the Financial Conduct Authority (FCA). As part of our role, we assist in providing insurance services and act in accordance with Brown & Brown's oversight and guidelines.

### How We Use Your Data

We collect and process your personal data to:

- Assess your insurance needs and provide appropriate insurance products.
- Fulfil contractual obligations related to insurance policies.
- Comply with legal and regulatory requirements.
- Communicate with you regarding your policies, claims, and other relevant matters.

We only use your data where we have a lawful basis to do so, including:

- **Performance of a Contract:** To deliver services and manage your insurance policy.
- **Legal Obligation:** To comply with FCA regulations and other legal requirements.
- **Legitimate Interests:** To improve our services and maintain accurate records.
- **Consent:** Where required, such as for marketing communications (if applicable).
- **Public Interest:** To process sensitive personal data when required for your insurance

### What Data We Collect

The types of personal data we may collect include:

- **Personal Identifiers:** Name, date of birth, address, and contact details.
- **Financial Information:** Payment details and financial status.
- **Insurance Details:** Policy information, claims history, and risk-related data.
- **Special Category Data:** Medical or criminal history (where necessary and permitted by law).

### How We Collect Your Data

We collect data through various channels, including:

- Direct interactions (e.g., phone calls, emails, or in-person consultations).
- Application forms and documentation you provide.
- Third parties such as insurers, intermediaries, or public databases.

### Data Sharing

We may share your personal data with:

- Brown & Brown and affiliated companies for regulatory purposes.
- Insurance providers, underwriters, and claims handlers.
- Regulators, auditors, or law enforcement when required by law.
- IT and service providers that assist in delivering our services.

We ensure that any third party with whom we share your data complies with data protection regulations.

### **Data Retention**

We retain your data only for as long as necessary to fulfil the purposes outlined in this statement or to comply with legal and regulatory obligations. Typically, this means retaining records for at least seven years after the end of our relationship.

### **Your Rights**

Under data protection laws, you have rights regarding your personal data, including:

- **Access:** The right to access the personal data we hold about you.
- **Rectification:** The right to correct inaccurate or incomplete data.
- **Erasure:** The right to request deletion of your data, where applicable.
- **Restriction:** The right to restrict processing in certain circumstances.
- **Data Portability:** The right to request transfer of your data.
- **Objection:** The right to object to certain processing activities.

To exercise your rights, please contact us using the details provided below.

### **Data Security**

We implement appropriate technical and organisational measures to protect your data against unauthorised access, loss, or misuse.

### **Contact Us**

If you have questions about this Privacy Statement or wish to exercise your data rights, please contact:

329 Burncross Road  
Burncross  
Sheffield, S35 1SB  
01143480931  
rob@portmanhealth.co.uk

Alternatively, you may contact Brown & Brown at:

Brown & Brown, Europe  
7th Floor, Corn Exchange,  
55 Mark Lane, London  
EC3R 7NE, United Kingdom  
data.protection@bbrown.com.

If you are not satisfied with how we handle your data, you may contact the **Information Commissioner's Office (ICO)** at <https://www.ico.org.uk>.

### **Updates to This Privacy Statement**

We may update this Privacy Statement from time to time. Please review this page regularly to stay informed about how we protect your data.