Privacy Statement for Portman Health and Protection Ltd.

At Portman Health and Protection Ltd, we are committed to protecting your personal data. This Privacy Statement explains how we collect, use, share and protect personal information in accordance with the UK General Data Protection Regulation (UK GDPR), the Data Protection Act 2018 and other applicable laws.
Portman Health and Protection Ltd is an Appointed Representative of Brown & Brown, which is authorised and regulated by the Financial Conduct Authority (FCA) under firm reference number 312878. As part of this relationship, personal data may be shared with our Principal for regulatory oversight, supervision, complaints handling, conduct risk management and other regulatory purposes

Who We Are
Portman Health and Protection Ltd is the controller of the personal data that we collect and use in connection with the insurance and related services we provide.
We are an Appointed Representative of Brown & Brown. Where personal data is shared with our Principal for regulatory, compliance, audit, oversight, risk management or complaints-handling purposes, the Principal may act as a separate data controller for that processing.
If you have any questions regarding this Privacy Statement or how we use your personal data, please contact us using the details set out below
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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.
- Carry out identity verification, fraud prevention and financial crime screening.
- Manage complaints, disputes and legal claims.
- Meet regulatory and compliance obligations.
- Support audit, governance and risk management activities.
- Protect our business, customers and staff.

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, bank account information, financial status and credit-related information where relevant.
- **Insurance Details**: Policy information, claims history, and risk-related data.
- **Special Category Data**: Information relating to health, medical conditions or other special category data where necessary for insurance purposes.
- **Criminal Convictions and Offences Data**: Information relating to criminal convictions, offences or allegations where relevant 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.
- From our Principal firm, insurers, brokers, employers, affinity partners, claims handlers, loss adjusters, fraud prevention agencies and other third parties involved in providing insurance services.

Data Sharing

We may share your personal data with:

- Our Principal firm for oversight, supervision, complaints handling, compliance and regulatory purposes.
- Insurers, reinsurers, underwriters, brokers and claims handlers.
- Professional advisers including legal, compliance, audit and accounting advisers.
- Regulators, courts, ombudsmen, law enforcement agencies and government authorities.
- Service providers who assist us with IT, document management, hosting, security and administrative services.
- Other members of the Brown & Brown group where appropriate.

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.

International Transfers
We may transfer personal data outside the UK where necessary to provide services, for group administration purposes or where required by our service providers. Where we do so, appropriate safeguards will be implemented in accordance with applicable data protection laws.

Contact Us
If you have questions about this Privacy Statement or wish to exercise your data rights, please contact:
Portman Health and Protection Ltd
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.