

## Aspire Wealth Management Privacy Notice 2024

### 1. Who are we?

Aspire Wealth Management Limited trading as Aspire Wealth Management and Master Trust Pensions is a data controller. We are a financial planning firm providing advice in the areas of retirement, investments and protection. We are authorised by the Central Bank of Ireland. As a data controller we determine how your personal data is processed and for what purposes. Our principle address is Priory House, 19 Priory Office Park, Stillorgan, Dublin, A94 H7A4, Republic of Ireland. Throughout this document, “Aspire”, “we”, “us”, “our” and “ours” refer to Aspire Wealth Management.

### 2. Information we collect about you.

To comply with our obligations under the General Data Protection Regulation (GDPR), we may collect the following information:

Names, contact information including home address, phone number, gender, date of birth, email address, marital status, employment details, copy or photo address ID (A passport, driver’s license, utility bill), copy of PPS number, bank account details, financial information, next of kin details, health information.

### 3. How we use your information

Aspire Wealth Management Ltd complies with its obligations under the “GDPR” by keeping personal data up to date; by storing and destroying it securely; by not collecting or retaining excessive amounts of data; by protecting personal data from loss, misuse, unauthorised access and disclosure and by ensuring that appropriate technical measures are in place to protect personal data.

#### We use your information for the following purposes:

- To provide you with advice for your exact needs
- To better understand your needs
- To improve our services to you
- To comply with applicable laws and regulations

### 4. The Legal Basis for using your information.

The legal basis we work from:

- Consent from clients. Where you have provided your consent to processing (e.g. To receive information about services of interest to you), you may withdraw your consent at any time by emailing [eposter@aspire-wealth.com](mailto:eposter@aspire-wealth.com)
- Performance of a contract
- Legal Obligation (E.g. Anti-Money Laundering & Central Bank of Ireland Obligations)

To promote our legitimate interests; this means that we may make you aware of services we offer that may be of interest to you based on services we already provide.

### 5. Who we share your information with

When providing services to you, in certain circumstances we may need to share personal information with:

- Your Authorised representatives
- Product providers we have agencies with, specifically life insurance companies, investment firms and trustees. We will only share information with them to arrange products on your behalf.
- Service Providers providing us with support services, including:
- Statutory and regulatory bodies which are law enforcement authorities.

#### **6. Transfer of your information outside the European Economic Area (EEA)**

By providing your information, you are consenting to the transfer of the information outside of the country to other jurisdictions outside of the European Economic Area (EEA). We are careful in our choice of service providers and, to the best extent possible, ensure that they have appropriate controls in place to safeguard data.

#### **7. How long we keep your information**

We keep your information in accordance with the guidance set out within our formal records, retention policies and do not maintain data beyond what is absolutely required.

#### **Your personal information rights.**

You have the following rights with respect to your personal data:

- The right to request a copy of your personal information.
- The right to correct and update your personal information.
- The right to request the deletion of your information in certain circumstances:
  1. You withdraw your consent.
  2. Your information must be deleted to comply with a legal obligation.
  3. Your personal information was unlawfully processed.
  4. Where there is no legitimate requirement to continue the processing.
  5. Where your information is processed in relation to the offer of services to a child.
- The right to request information transfer digitally.
- The right to object to the processing of personal data, where the firm:
  1. Relies on legitimate interests as the legal basis for processing.
  2. Is using the data for direct marketing.
  3. Is processing data for the purposes of scientific/historical research and statistics.

#### **8. To Exercise your rights**

You may exercise any of these rights free of charge by contacting us at:

Name: Eamon Porter Phone: +353 862253551

Email: [eporter@aspire-wealth.com](mailto:eporter@aspire-wealth.com)

Address: Priory House, 19 Priory Office Park, Stillorgan, Dublin, A94 H7A4

#### **9. The right to lodge a complaint.**

With the Data Protection Commissioner. Details below

Data Protection Commissioner

Dublin Office: 21 Fitzwilliam Square South, Dublin 2. D02 RD28 Co. Dublin

Portarlinton Office: Canal House, Station Road, Portarlinton, R32 AP23 Co. Laois

Phone: +353 1 7650100 or 1800 437437

Web: [www.dataprotection.ie](http://www.dataprotection.ie)

#### **10. Cookies**

We use cookies to help us operate our website and services in order to enhance and customize your experiences with us.

#### **11. Further processing**

If we wish to use your personal data for a new purpose, not covered by this Data Privacy Notice, then we will provide you with a new notice explaining the new use of your personal data prior to commencing the processing. We will seek your prior consent to the new processing.

#### **12. Changes to this notice**

Should we update, amend, or make any changes to this document, those changes will be posted here.