



## Privacy Notice

Acorn Financial Services Limited is committed to respecting and protecting your privacy. We wish to be transparent on how we process your data and show you that we are accountable with the GDPR in relation to not only processing your data but ensuring you understand your rights as a client.

It is the intention of this privacy statement to explain to you the information practices of Acorn Financial Services in relation to the information we collect about you.

For the purposes of the GDPR the data controller is:

- *Mandy Tiernan or Cormac Woods*
- *042 933 3460, 1st Floor Riverhouse, Riverlane, Dundalk Co Louth*

Please read this Statement carefully as this sets out the basis on which any personal data we collect from you, or that you provide to us, will be processed by us.

Acorn Financial Services will process (collect, store and use) the information you provide in a manner compatible with the EU's General Data Protection Regulation (GDPR). We will endeavour to keep your information accurate and up to date, and not keep it for longer than is necessary.

### Types and Categories of personal data held

We gather, record and hold information about you in order to provide you with products or services. The information required to provide you with a service, mortgage, investment, pension or other insurance product will be recorded.

### Special Categories of personal data

If we collect any special categories of personal data (e.g. health, religious beliefs, racial, ethnic origin – financial information is not classified as special categories of personal data) – we will ensure to

- we will obtain your explicit consent

### Use of the information we gather

Acorn Financial Services will process (collect, store and use) the information you provide in a manner compatible with the EU's General Data Protection Regulation (GDPR). We require the information in order to assist us in ascertaining your requirements.

We will endeavour to keep your information accurate and up to date, and not keep it for longer than is necessary.

### Retention of your Personal Data

Data will not be held for longer than is necessary for the purpose(s) for which they were obtained. Acorn Financial Services will process personal data in accordance with the retention schedule set out by The Central Bank of Ireland under the CPC 2012 and AML and CTF act 2010.

### Sharing information with third parties

We may pass your personal data on to third-party service providers contracted to Acorn Financial Service in the course of dealing with you. Any third parties that we may share your data with are obliged to keep your details securely, and to use them only to fulfil the service they provide on your behalf. When they no longer need your data to fulfil this service, they will dispose of the details in line with Acorn Financial Services procedures.

If we wish to pass your sensitive personal data onto a third party we will only do so once we have obtained your explicit consent, unless we are legally required to do otherwise.

The third parties that we pass your personal data to are:

- Life Offices with which we hold agencies
- Mortgage Providers with which we hold agencies
- Pension Providers with which we hold agencies
- Investment companies with which we hold agencies

### Data Subjects Rights

Acorn Financial Services facilitates you, our clients, rights in line with our data protection policy and the subject access request procedure. This is available on request.

- **Right of access** – you have the right to request a copy of the information that we hold about you.
- **Right of rectification** – you have a right to correct data that we hold about you that is inaccurate or incomplete.
- **Right to be forgotten** – in certain circumstances you can ask for the data we hold about you to be erased from our records.
- **Right to restriction of processing** – where certain conditions apply to have a right to restrict the processing.
- **Right of portability** – you have the right to have the data we hold about you transferred to another organisation.
- **Right to object** – you have the right to object to certain types of processing such as direct marketing.
- **Right to object to automated processing, including profiling** – you also have the right to be subject to the legal effects of automated processing or profiling.
- **Right to judicial review:** in the event that Organisation Name refuses your request under rights of access, we will provide you with a reason as to why.

All of the above requests will be forwarded on should there be a third party involved as we have indicated in the processing of your personal data.

### Complaints

If you are not satisfied with how we store your data or fail to satisfy a data request you have the right to make a complaint to the Data Protection Commissioner

Data Protection Commissioner: 21 Fitzwilliam Square, Dublin 2, D02 RD28

Lo call Number: 1890 252 231

Email: [info@dataprotection.ie](mailto:info@dataprotection.ie)

### Contact Us

Telephone : 0429333460

Email: [info@acorn.ie](mailto:info@acorn.ie)



## Terms of Business Acknowledgement Letter

Terms of Business Effective Date / /

Client Name: \_\_\_\_\_

### Status

Cormac Woods Financial Services LTD T/A Acorn Financial Services, Save Me is regulated by the Central Bank of Ireland.

Registered Office: Riverhouse, Riverlane, Dundalk, Co.Louth. Registered in Ireland.

Company reg. no.304639. Directors: Cormac Woods, Gerard Woods

### Terms of Business

Attached are the Company's Terms of Business, which outline the basis on which we provide services to our clients. Please ensure that you read this document carefully. These Terms of Business apply to all business transactions undertaken for you or services provided to you and will remain in force until further notice. Should we make any material changes to our Terms, we will advise you in advance of providing any further services to you.

## Consent to Contact

Here at Acorn Financial Services we take your data protection seriously and will only use your data as discussed with you in our privacy statement.

However, from time to time may wish to contact you in relation to products and services we provide.

Agreed methods of contact

- Email
- Phone
- SMS
- Post
- Fax
- Please do not contact me

Customer Signature ..... Date.....

\* Even if you do subscribe now you can always unsubscribe at any time.