

PRIVACY POLICY

Privacy Policy

Executive Advisory Services are a Chartered Financial Planners; this privacy policy explains how we use any personal information we collect about you.

What information do we collect about you?

We collect information about you when you meet with us, during our fact-finding process. We also collect information when you voluntarily complete customer questionnaires, application forms, authorise letters of authority for information on plans/policies/investments not originally sold by us. Data is also collected when you provide feedback and via our treating customer fairly questionnaires. Website usage information is also collected using cookies.

How will we use the information about you?

We collect information about you to process your fact find, manage your account and, if you agree, to email you with our quarterly newsletters and occasional mailings regarding products and related services.

EAS will not share your information for marketing purposes with other companies.

In processing your fact find, we may send your details to, and also use information from credit reference agencies and fraud prevention agencies.

We will continue to hold your information indefinitely once you become a client; if after the initial meetings you do not engage our services and have received no financial advice we will shred your data within 6 months.

Marketing

We would like to send you information about products and services of ours and other companies in our group which may be of interest to you. If you have consented to receive marketing, you may opt out at a later date.

You have a right at any time to stop us from contacting you for marketing purposes or giving your information to other members of the EAS.

If you no longer wish to be contacted for marketing purposes, please email enquiries@eas-ifa.com

Access to your information and correction

You have the right to request a copy of the information that we hold about you. If you would like a copy of some or all of your personal information, please email or write to us at the following address enquiries@eas-ifa.com.

We want to make sure that your personal information is accurate and up to date. You may ask us to correct or remove information you think is inaccurate.

Visitors to our website

When someone visits www.eas-ifa.com we will collect data through the completion of our 'get in touch' section, this information will not be used for marketing or sharing with any 3rd party.

Use of cookies by EAS

Cookies are text files placed on your computer to collect standard internet log information and visitor behaviour information. This information is used to track visitor use of the website and to compile statistical reports on website activity.

For further information visit www.aboutcookies.org or www.allaboutcookies.org.

You can set your browser not to accept cookies and the above websites tell you how to remove cookies from your browser. However in a few cases some of our website features may not function as a result.

Other websites

Our website contains links to other websites. This privacy policy only applies to this website so when you link to other websites you should read their own privacy policies.

Changes to our privacy policy

We keep our privacy policy under regular review.

This privacy policy was last updated on March 22nd 2018.

How to contact us

Please contact us if you have any questions about our privacy policy or information we hold about you:

- By email on enquiries@eas-ifa.com
- Or write to us at: Executive Advisory Services, Lower Road, Cookham, Berks, SL6 9HF