

## Website 'Just in Time' notice

As part of a layered approach, Appointed Representatives should provide users of their website with a brief message explaining how their data will be used whenever they are asked to input personal data - for example, if a client is requesting a call back via a contact form.

An example of this would be:-

STEP BY STEP FINANCIAL SOLUTIONS will be what is known as the 'controller' of the personal data you provide to us. We only collect basic personal data about you which does not include any special types of information or location-based information.

Why do you need my data and what will it be used for?

We need to know your basic personal data so we can make contact with you and respond to your message, request or query. All the personal data we process is processed by our staff in the UK.

Who is my data shared with?

Your data will only be shared with third parties if this is necessary to respond to your request. If this is the case, we will seek your permission before passing on your details.

How long do you keep my data for?

We may store your data for up to six years past the end of any business relationship, after which time it will be securely destroyed. If you would no longer like us to process your data at any time, you have the right to object to processing of your data. To do this, please contact [info@sbsfinance.co.uk](mailto:info@sbsfinance.co.uk)

What are my rights?

You have the right to object to the processing of your data. You also have the right to request access to your data at any time. You have the right to rectification and/or erasure of personal data or restriction of processing. If you wish to raise a concern related to how we have handled your personal data, you can contact us to have the matter investigated at [compliance@sdlgroup.co.uk](mailto:compliance@sdlgroup.co.uk). If you are not satisfied with our response or believe we are processing your personal data not in accordance with the law, you can complain to the information commissioner's office: <https://ico.org.uk>

By selecting the box, you acknowledge that you have read and understood the above privacy notice and consent to its terms.

This statement can be condensed by only displaying the questions and expanding the text to show the answer when the customer clicks on that question.