

Privacy Policy Statement

Mount Sterling Wealth Ltd is an independent financial advisory company. This privacy policy explains how we use any personal information we collect about you when you use our services.

Important subjects:

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1 What information do we collect about you?

We collect information about you once you talk to us about your personal and financial circumstances. This can extend to immediate family members and other connected individuals or bodies (e.g. any business you are associated). We may also collect information about you if you voluntarily complete customer surveys or provide feedback, for example. If and when we use our website to collect information about you the information may be collected using cookies.

2 How will we use the information about you?

We collect information about you to provide you with advice, periodically process your orders, manage your account and, if you agree, to contact you about products and services we think may be of interest to you. When you provide information through our website, we use that information collected from the website to personalise your repeat visits to the website. If you have agreed, we will pass on your relevant personal information other firms party to transactions. We may be required to share your information with our regulators, compliance consultants, credit reference agencies and fraud prevention agencies (including for tax and anti money laundering purposes).

3 How long will we hold the information about you?

If we acquire information about you before we agree services, we will retain that information for a reasonable time (usually a year) in case you change your mind;

Once we have formally agreed services, we will retain your information for the duration of those services and for a period beyond that, which will broadly be in line with the period we will be legally at risk. This is usually 15 years except in specific and exceptional circumstances.

You can ask us to delete information we hold about you at any time, which we will do unless we have legal reason not to.

4 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. If you no longer wish to be contacted for marketing purposes, refer to the contact section below.

5 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 address below. We may make a small charge for this service. 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.

6 Cookies

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.

7 Other websites

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

8 Changes to our privacy policy

We keep our privacy policy under regular review and we will place any updates on this web page. This privacy policy was last updated on 15th May 2018.

9 How to contact us

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

Email: office@mountsterlingwealth.com
Post: Mount Sterling Wealth Ltd
Sheepwalk; 9 The Menagerie; Escrick;
York; YO19 6ET