

**May 2018**

**PRIVACY NOTICE**

This Privacy Notice tells you what to expect in relation to personal information about you which is collected, handled and processed by Patterson Irving Limited.

Patterson Irving Limited is an executive search and consulting firm covering the Insurance and Reinsurance Markets of Financial Services. Our Clients are leading insurance groups, underwriting firms, global brokers and specialist insurance businesses.

We provide our Clients with a professional service based upon integrity, confidentiality and mutual respect. This approach is extended to all candidates and individuals that we meet during the course of our business activity.

**The information we may collect**

All information that we may collect about you will be handled and processed in accordance with applicable data protection law in force at the time. With effect from 25<sup>th</sup> May 2018 the General Data Protection Regulation (GDPR) is in full force and effect.

The personal information about you that we may collect, handle and process is set out as follows:

1. Information collected, handled and processed by us in the course of our business activity is –

Your name

Your home address

Your contact telephone number both mobile and landline

Your email address

Your CV document both hard copy and digital

Your career history and resume on digital sites such as LinkedIn

Your current remuneration and employee benefit package details

Your education and professional qualifications

Your communications with us by email and telephone

Any other career-related information

2. Additional information collected, handled and processed by us in respect to those individuals and/or contractors that have worked with us, currently work with us or may work with us is –

Date of birth

National Insurance number

Medical (as required in certain cases)

References (as required in certain cases)

Financial (such as bank account information)

Any other work-related information

This information will have been provided, or will be provided, by you or a third-party resource such as LinkedIn or other digital resource. References will be from your previous employer. Medical information may be supplied to us by your GP, Consultant or Occupational Health. Financial information will be provided by you.

### **How we use this information**

The above information is used by us in so far as is applicable to provide services to Clients and to you in our capacity as an executive search and consulting firm.

- To match your experience, expertise, skill sets with the criteria set out in the search assignment terms of reference.
- To match your experience, expertise, skills sets with the criteria as set out in the consulting project terms of reference.
- To keep you informed of opportunities as they may arise.
- To establish you have the right to work.
- To undertake relevant security and verification checks as requested of us by our Clients.
- To handle any medical and/or health and safety issues relating to certain appointments.
- To assist in putting in place contractual arrangements, documentation and other matters as requested of us by our Clients, regulatory and statutory bodies.
- To remunerate you.

### **How we hold this information**

All the personal data we have is stored on our database in the UK.

### **Disclosure of this information**

Your information will be shared or sent to our Clients. Such Clients will usually be located inside the European Economic Area (EEA) but may be outside of the EEA. Personal data shall not be transferred to a country or territory outside of the EEA unless that country or territory ensures an adequate level of protection or the appropriate safeguards are in place for your rights and freedoms. We will provide you with further information before such a transfer takes place outside of the EEA.

We will share your information with trusted third-party organisations such as HM Revenue & Customs, legal advisors, regulatory and/or statutory bodies as requested and/or legally obliged to do so.

### **Legal basis for retaining this information**

We will rely on your consent, given or implied, to handle the information that we may collect in the course of our lawful business activity.

Information and documentation to establish your right to work is collected, handled and processed by us as we are legally obliged to do so.

The basis for us handling medical information will depend on circumstances but may be to prevent discrimination on the grounds of disability or where consent has been obtained, if required.

Information in relation to some appointments requiring regulatory or statutory approval will be handled and processed on the basis that it is necessary for us or our Clients to comply with UK law or consent will be obtained, if required.

For the purposes of remunerating you, where relevant, we are legally obliged to provide information to HM Revenue & Customs.

Once a search assignment or consulting project is completed, we may also process this information on the basis of our legitimate interests i.e. for administrative purposes.

### **Retention of this information**

Your data will be retained by us for no longer than is necessary and in accordance with our Data Retention Policy.

If you want a copy of this policy, please email: [information@pattersonirving.com](mailto:information@pattersonirving.com).

### **Withdrawal of consent**

You have the right to withdraw your consent for us to handle and process your data for the purposes of our business activity.

If you want to withdraw your consent, please email: [information@pattersonirving.com](mailto:information@pattersonirving.com).

### **Your rights**

You currently have the right at any time to ask for a copy of the information that we hold about you. We will not charge an administration fee for this information.

If you want to make a request for this information, please email: [information@pattersonirving.com](mailto:information@pattersonirving.com).

Now that GDPR is in force and effect, you also have additional rights that include the following:

#### **The Right to be Informed (Articles 7 and 13)**

This provides for you as the Data Subject (you) with the Right to be Informed about what your data is being used for. This will usually be a combination of consent and our Privacy Notice.

#### **The Right of Access (Article 15)**

This provides you with the Right of Access to your data. You may request access to the personal data and sensitive personal data that we hold on you. Following your written request, we have just 1 month to respond, but in complex cases, we can extend the time, but this is to be the exception rather than the rule.

We do use a computer system but that does not allow you or anyone else other than us with access to your data. We can produce a printed copy of this information.

Under the Data Protection Act we are permitted to charge a small fee to fulfil such requests: under the GDPR this has all but been removed.

#### **The Right of Rectification (Article 16)**

You, having identified errors in the personal data that we keep about you, have the Right of Rectification for that information to be corrected.

#### **The Right to Erasure (Article 17)**

This Right to Erasure is often called the “right be forgotten”. You can request that your personal data be removed from our computer systems. We do have the right to refuse

the removal of the information that is required for legal or regulatory purposes. Information is only kept for the period required within our Data Retention Policy.

### **The Right to Restriction of Processing (Article 18)**

If you have requested a copy of your data and have identified errors or omissions in the data, you have the right not only to request that the data be corrected but also, that the processing of that data is restricted until the issue has been resolved.

### **The Right to Data Portability (Article 20)**

You not only have the right to request your data in a human-readable form (the Right of Access), this Right of Data Portability grants you access to your data in a machine-readable form, such as industry standard formats of CSV file, XML or another standard as may be agreed by the HR system developers.

### **The Right to Object (Article 21)**

You have the Right to Object to the use or processing of your personal data in a particular way. This may be a request to stop using the data for marketing purposes for example.

### **The Right to Manual Processing (Article 22)**

The Right to Manual Processing grants you the right to have a process performed by a person rather than an automated process, where that automated process is making a significant decision.

### **Contact**

Please address any questions, comments and requests regarding our data handling and processing practices to Data Management at:

Patterson Irving Limited  
Birchin Court, 20 Birchin Lane, London EC3V 9DU

[information@pattersonirving.com](mailto:information@pattersonirving.com).

### **Changes to this Privacy Notice**

This Privacy Notice may be changed by us from time to time and was drafted in May 2018.