



Adviser Finder - Privacy Policy

Effective Date: 27/06/2025, 12:06:39

1. Information We Collect

We collect information you provide directly to us, such as when you:

- Request access to our wealth management guides and resources
- Submit inquiries for adviser matching services
- Contact us through our website forms
- Subscribe to our communications

This may include your name, email address, company information, and details about your financial situation to help us provide appropriate guidance.

2. How We Use Your Information

We use the information we collect to:

- Provide you with requested financial guidance and resources
- Match you with appropriate financial advisers and specialists
- Respond to your inquiries and provide customer support
- Send you relevant financial insights and updates (with your consent)
- Improve our services and website functionality
- Comply with legal obligations and protect our rights

3. Information Sharing

We may share your information in the following circumstances:

- Financial Advisers: When you request adviser matching, we share relevant information with vetted financial professionals

- **Service Providers:** With trusted third-party providers who assist in delivering our services
- **Legal Requirements:** When required by law or to protect our rights and the rights of others
- **Business Transfers:** In connection with any merger, sale of assets, or acquisition

We do not sell, rent, or trade your personal information to third parties for marketing purposes.

4. Data Security

We implement appropriate technical and organisational measures to protect your personal information against unauthorised access, alteration, disclosure, or destruction. This includes encryption, secure data storage, and regular security assessments. However, no method of transmission over the Internet is 100% secure, and we cannot guarantee absolute security.

5. Data Retention

We retain your personal information for as long as necessary to fulfil the purposes outlined in this privacy policy, unless a longer retention period is required or permitted by law. When we no longer need your information, we will securely delete or anonymise it.

6. Your Rights

Depending on your location, you may have the following rights regarding your personal information:

- Access to your personal information
- Correction of inaccurate information
- Deletion of your information (subject to legal requirements)
- Restriction of processing
- Data portability
- Objection to processing for direct marketing

To exercise these rights, please contact us using the information provided below.

7. Cookies and Tracking

Our website may use cookies and similar tracking technologies to enhance your browsing experience, analyse website traffic, and understand user preferences. You can control cookie settings through your browser preferences, though this may affect website functionality.

8. Third-Party Links

Our website may contain links to third-party websites. We are not responsible for the privacy practices of these external sites. We encourage you to review the privacy policies of any third-party websites you visit.

9. Changes to This Policy

We may update this privacy policy from time to time to reflect changes in our practices or applicable laws. We will notify you of any material changes by posting the updated policy on our website and updating the "Last updated" date.

10. Contact Us

If you have questions about this privacy policy or our data practices, please contact us:

Adviser Finder

Email: hello@adviserfinder.org

Adviser Finder is a trading style of Prospect Finder Ltd which is registered in England and Wales (Company No. 16593953).