Privacy Policy – Adviser Finder

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

Important Information About Calls and Your Choices

If you contact us to request information or ask for a brochure, we may contact you afterwards with a courtesy call to confirm you received the requested material and to discuss whether you would like to be introduced to an FCA-authorised financial adviser.

You remain in control of how we contact you:

- You may ask us to stop calling you at any time during a call, by emailing us at hello@adviserfinder.org, or by writing to us at our registered address.
- If you choose to opt out, we will cease further contact and retain your details on a suppression list to ensure you are not contacted again in future.

Our lawful basis for making an initial follow-up call is our legitimate interest in responding to your enquiry and completing the service you requested. Where you choose to proceed with an introduction to a financial adviser, we will only share your information with your consent, which is recorded when provided.

About Us

Adviser Finder ("we", "our", or "us") operates as an information and introduction service designed to connect individuals with FCA-regulated professionals.

We do not provide regulated financial advice ourselves.

Contact Information

Email: hello@adviserfinder.org
Telephone: (020) 3488 6902
Address: 124 City Road, London, EC1V 2NXC

When You Submit an Enquiry or Request Information

When you complete a form on our website, request a brochure, or ask to be connected with a professional adviser, we may collect information such as:

- Your name

- Contact details
- High-level financial and personal information voluntarily provided by you, such as your approximate asset range, income range, age range, financial objectives, or other relevant circumstances
- Information relating to your enquiry or interests

This information is stored securely and used to help us connect you with an appropriate professional adviser.

Our processing of this information is necessary to provide the service you requested and is carried out on the basis of contractual necessity.

If the adviser you initially selected is unavailable, we may attempt to identify another suitable adviser in your area who matches your requirements. Your information will only be shared with professionals relevant to your enquiry and not with unrelated third parties without your permission.

In some cases, if we are unable to complete your enquiry through our normal process, either Adviser Finder or one of our trusted partners may contact you to confirm or clarify your details to help complete your request and improve the likelihood of finding a suitable adviser.

If You Contact Us Directly

Where you contact us by phone, email, or other methods, we may use your information to:

- Respond to your enquiry
- Provide customer support
- Monitor and improve our services
- Request feedback regarding your experience

Data Security and Storage

We take reasonable technical and organisational measures to safeguard your personal information.

Any information submitted through our website is protected using encryption technology during transmission.

Although no online transmission can ever be guaranteed completely secure, we apply appropriate safeguards and security procedures to minimise the risk of unauthorised access, misuse, or disclosure.

We process all personal information in accordance with applicable UK data protection laws.

Marketing and Additional Communications

You may choose to receive additional communications from us, such as newsletters or updates.

Your decision to opt in or opt out of marketing communications will not affect the core service we provide.

You can unsubscribe from marketing communications at any time by:

- Clicking the unsubscribe link included in emails, or
- Contacting us at hello@adviserfinder.org

Legal Basis for Processing Personal Data

Depending on the circumstances, we rely on one or more of the following legal bases:

Contractual Necessity

Where you submit an enquiry, we need to process your information in order to provide our introduction and matching service.

Legitimate Interests

We may contact you following an enquiry or brochure request where it is reasonable to do so as part of completing the service you requested. We carefully consider your rights and provide clear opportunities to opt out of further contact.

Consent

We rely on consent where:

- You agree to be introduced to an FCA-regulated adviser, or
- You choose to receive marketing or promotional communications from us

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Your Data Protection Rights

Under UK data protection legislation, you may have the right to:

- Request access to your personal data
- Ask for inaccurate data to be corrected
- Request deletion of your data
- Restrict or object to certain types of processing
- Object to follow-up communications
- Request transfer of your data to another organisation
- Challenge decisions made solely by automated means
- Lodge a complaint with the Information Commissioner's Office (ICO)

To exercise any of these rights, please contact us at:

hello@adviserfinder.org

Complaints

We aim to resolve concerns quickly and fairly. However, you also have the right to contact the Information Commissioner's Office directly.

Information Commissioner's Office (ICO)

Website: ICO Website
Telephone: 0303 123 1113

Website Disclaimer

This website contains general information relating to financial advisers, mortgage advisers, accountants, and other professionals operating within the United Kingdom.

The content provided is intended for general informational purposes only and should not be considered financial, legal, or professional advice.

Adviser Finder does not endorse, guarantee, or approve any individual adviser or firm listed or introduced through our service and accepts no responsibility for advice or services provided by third-party professionals.

Changes to This Policy

We may revise this Privacy Policy periodically to reflect updates to our practices, legal obligations, or services.

Any updates will be published on this page, and the most recent version will always apply.

Contact Us

If you have any questions, comments, or concerns regarding this Privacy Policy or the way we handle personal information, please contact:

hello@adviserfinder.org

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