

WEBSITE PRIVACY AND COOKIES NOTICE

Last updated: 29 February 2024

1. ABOUT THIS PRIVACY AND COOKIES NOTICE

The website www.excentius.com (the Site) is operated by PTT Advisory Limited (“we”, “us”, “our”), a company incorporated in England and Wales under company number 17369849. Our registered office is at 19 Kings Avenue, Rochester, ME1 3DS .

1.1 We are committed to protecting your privacy and complying with our data protection obligations under the Data Protection Act 2018 (the DPA 2018), the UK General Data Protection Regulation 2016/679 (the UK GDPR) and any other applicable UK legislation (together, Data Protection Law).

1.2 When you interact with us or use the Site, we act as the data controller of your personal data. This means that we are responsible for processing your personal data and deciding how to use it. This privacy and cookies notice explains the types of personal data we may collect about you when you interact with us, why we collect it, what we use it for and what rights you have over that data. Personal data is any information about an identifiable person. Processing is anything we do with your personal data, including using, storing, sharing and deleting it.

1.3 This notice was last updated on the date shown at the top. We may change this notice at any time by posting an updated version on the Site and will make reasonable efforts to bring any material changes to your attention. You may wish to check it before using the Site as any changes will be effective from the date that they are made.

2. CONTACT INFORMATION

2.1 If you have any concerns or would like further information about our use of data or this notice in general, you can contact Paul Oliver at enquiries.paul@excentius.com.

3. WHAT INFORMATION DO WE COLLECT?

3.1 We collect, store and use the types of personal data set out in the table at the end of this notice.

4. HOW WILL WE USE YOUR PERSONAL DATA?

4.1 We will use your personal data for the purposes set out in the table at the end of this notice.

5. HOW DO WE SHARE YOUR PERSONAL DATA?

5.1 When we share personal data, we do so in accordance with Data Protection law. We may share certain personal data, where necessary, with employees, contractors, consultants or advisers, to facilitate sales and for general commercial purposes

In addition, where necessary, your personal data may be shared with:

5.1.1 if the company or business is sold, transferred or integrated with another business, with our advisers, a prospective purchaser, a prospective purchaser’s advisers or the new owner of the company or business to facilitate the process.

5.2 We may also provide third parties with aggregated but anonymised information and analytics about our customers. Before we do so we will make sure that it does not identify you.

6. USE OF COOKIES AND SIMILAR TECHNOLOGIES

6.1 We and our third-party service providers use cookies and similar technologies to collect information about, and relevant to, your usage of the Site. Cookies are small text files that are stored on your computer when you visit the Site. It is standard practice to use cookies to make your experience better when using a website.

6.2 We use the following categories of cookies and similar technologies on this Site:

6.2.1 Strictly necessary cookies: These cookies are essential to enable you to move around the Site and use its features, and to keep the site secure. Without these cookies, services you have asked for (such as remembering your login details or the items you placed in your basket) cannot be provided.

6.2.2 Analytics cookies: These cookies collect information about how you use the Site, for instance which pages you go to most often, what searches you perform and if you get error messages from web pages. Information these cookies collect can be used to improve how the Site works.

6.2.3 Social media cookies: These cookies allow you to share your activity on the Site on social media such as Facebook and Twitter. These cookies are not within our control. Please refer to the privacy policies of the social networks in question for information regarding how their cookies work.

6.3 When you visit the Site for the first time (and periodically after that), we will request your consent to the setting of all cookies other than strictly necessary cookies.

6.4 You can delete existing cookies and disable some or all types of cookies in future if you wish. To disable some or all types of cookies, you will have to either change the settings on your browser or use the cookie manager tool on the Site. See <https://www.allaboutcookies.org/manage-cookies/> for information on how to change your browser settings. If you change your mind, you can enable cookies again at any time. Disabling cookies on your browser may stop the Site from working properly.

6.5 To find out more about cookies please visit www.allaboutcookies.org.

7. THIRD PARTY LINKS

7.1 This Site contains links to other websites over which we have no control. We are not responsible for and do not review or endorse the privacy policies or practices of other Sites which you choose to access from this Site. We encourage you to review the privacy policies of those other Sites, so you can understand how they collect, use and share your personal information.

8. YOUR RIGHTS

8.1 We respect your rights to privacy and will respond to requests for access or control over information about you in accordance with Data Protection Law. We may require you to verify your identity before we take any action.

8.2 Depending on the reason we have your personal data, you have a right to:

8.2.1 access the personal information we hold about you (commonly known as subject access);

8.2.2 request that we correct or complete personal information we hold about you that is inaccurate or incomplete;

8.2.3 request that we erase your personal information in some circumstances, or object to our processing it as detailed at paragraph 8.5;

8.2.4 restrict how we use your personal information, in certain circumstances;

8.2.5 request that we provide you with copies of your personal information in a machine-readable format or transfer it across different services; and

8.2.6 where we have asked for your consent to process your data, to withdraw this consent.

8.3 These rights are limited in some situations under Data Protection Law – for example, where we can demonstrate that we are under a legal obligation to process your data.

8.4 If you wish to exercise any of these rights, please contact us using the details in paragraph 2 above.

8.5 Your right to object

You have a right to object to our processing of your personal data and ask us to stop doing so. If we are processing your personal data for direct marketing purposes (which includes profiling to the extent that it is related to such direct marketing) and you object to this, we will stop processing your personal data immediately.

If our processing of your personal data is in the public interest or pursuant to our legitimate interests and you object to this, we will stop processing your personal data unless we have compelling reasons which override your interests, or our use of your personal data is for the establishment, exercise or defence of legal claims.

8.6 We hope that we can satisfy any queries you may have about the way we process your data. However, if you have unresolved concerns you also have the right to complain to data protection authorities (in the UK, the Information Commissioner's Office). You can call the ICO on 0303 123 1113 or go to their website: <https://ico.org.uk/make-a-complaint/>.

9. DATA RETENTION

9.1 Your personal data will only be kept for as long as necessary for our purposes. Specific periods are set out in the table at the end of this notice.

10. DATA PROTECTION PRINCIPLES

10.1 We process your personal data in accordance with the following principles:

10.1.1 we process your personal data lawfully, fairly and in a transparent way;

10.1.2 we collect your personal data for specified, explicit and legitimate purposes; any further processing we do is compatible with the original purposes for which we collected it;

10.1.3 we only process personal data which is adequate, relevant and limited to what is necessary to achieve the purpose for which it is processed;

10.1.4 we take reasonable steps to ensure that all personal data is accurate and kept up to date where necessary;

10.1.5 we do not store personal data in a form which identifies you for any longer than is necessary for the purposes of processing; and

10.1.6 we process personal data securely and in a way that protects against unauthorised or unlawful processing, accidental loss, destruction or damage.

10.2 When we ask for your personal data we will tell you whether you are required by law or contract to provide it, and what will happen if you do not provide the data.

10.3 Any request for consent to the processing of your personal data will be made directly to you and will include information about why we require the personal data and what will be done with it.

11. WHAT IS OUR LAWFUL BASIS FOR PROCESSING?

11.1 We will only process personal data when we have a lawful basis for doing that processing. The table at the end of this notice sets out the lawful basis we rely on for each type of data we process.

11.2 We will choose one of the lawful bases in the UK GDPR to justify how we use your personal data. These are:

11.2.1 Consent: You have given consent to the processing of your personal data for one or more specific purposes.

11.2.2 Contract: The processing is necessary for the performance of a contract with you or in order to take steps at your request before entering into a contract.

11.2.3 Legal obligation: We need to process your personal data to comply with a legal obligation.

11.2.4 Vital interests: The processing is necessary to protect the vital interests of you or another person.

11.2.5 Public interest: Processing is necessary for the performance of a task carried out in the public interest or in the exercise of some official authority.

11.2.6 Legitimate interests: Processing is necessary for the purposes of legitimate interests pursued by us or someone else, except where such interests are overridden by your interests or fundamental rights and freedoms requiring the protection of your personal data.

TABLE OF PERSONAL INFORMATION WE USE

The table below sets out detailed information about our purposes for processing, the basis for processing and the retention period for the personal data.

Category of personal data	Purpose of processing	Lawful basis for processing	Retention period
Name and contact details	To contact you with information, newsletters and marketing materials about our products and services	Consent	For three years since you gave consent, or until you withdraw consent if earlier
Payment information	To take payment for services provided.	Performance of contract Compliance with legal obligation	For 1 year since you communicated with us.
Browser, device and Site usage information	To improve the Site To protect the Site against fraud To set default options for you, such as language and currency	Performance of contract Legitimate interest in maintaining our Site	For three years since you last logged on to the Site