

ASSURED FUNDING LTD are committed to protecting your privacy. This policy statement, together with any document referred to within, sets out the basis on which we will use the personal information you supply to us directly yourself or supplied to us by a third party. ASSURED FUNDING LTD is responsible for the processing of the personal information you supply and is registered with the Information Commissioners Office under the UK Data Protection Acts (as amended from time to time), registration number (ZA138995).

Website

We have structured our website so that you can visit without identifying yourself or revealing any personal information.

If you review or download information from the website, this information is tracked to enable us to provide you with tailored information and to give us information about your use of our website. This action will not personally identify you.

Should you wish to complete a contact or enquiry form on the website or through our connected portals, we collect and store the personal information supplied to us via secure servers to enable us to fulfil your request.

Any personal information you chose to disclose via the website or portals will be processed in accordance with this privacy notice.

What information do we collect?

To arrange a mortgage, loan or other plan or service for you, we will need to collect a wide range of personal data and financial related information. Our UK based team will only collect information that is pertinent to the service we provide and will hold this information only for as long as necessary.

We will also collect credit or debit card details to make payments for ASSURED FUNDING LTD services and to pass to relevant parties such as lenders and surveyors. This information will not be retained after payment has been made.

We will retain and process your personal information based on our 'Terms of Business' contract with you, our statutory and legal obligations, our regulatory requirements and our legitimate business interests.

How is the information collected?

We collect information via a variety of means which include website forms, telephone calls, email, text messages, social media, post, fax and face to face meetings. We may also monitor and record our telephone conversations with you.

The information may be collected directly by ASSURED FUNDING LTD and its staff or from third parties to whom you have agreed may pass your personal information to ASSURED FUNDING LTD.

How is the information used?

ASSURED FUNDING LTD will use personal data received to process your request for a mortgage, loan or other plan or service on your behalf. You may advise us at any time should you no longer wish us to use your data. We will use the information in several ways to improve how we support our customers, which includes but is not limited to:

- Letting you know about changes to our products and services.
- Confirmation of your identity.
- Training of our staff and fraud Investigation and prevention.
- Confirmation of the documents and information you provide to us.
- Keeping our records up to date and complying with regulatory and legal obligations.
- Administration and review of the mortgages, finance and products we have arranged for you.
- Helping us to assess your needs for protection plans in connection with your borrowing.
- Conducting surveys to help us improve our service.

Who will your information be shared with?

To arrange a mortgage, loan or other plan or service we will need to share your personal data with relevant third parties. These third parties include mortgage lenders, product providers, surveyors, solicitors and other parties that relate to your applications.

When we proceed with a mortgage, loan or other plan or service for you and your data is shared with a lender or provider, we recommend you also read their Privacy Notice in conjunction with ours. This can be found on the lenders or providers website or our central page here: <https://connectbrokers.co.uk/lenderprivacy/>
As an Appointed Representative of Connect IFA Ltd, information about yourself will be shared with Connect IFA Ltd who are our Network. Connect IFA Ltd assist us with the processing your application as well as for compliance oversight purposes.

If your request for services has come from an introducer of business to ASSURED FUNDING LTD, we may share limited information with the introducer for the purposes of keeping them informed as to how your application is progressing.

We use third party software systems including cloud-based storage, to help us to manage mortgage, loan and product applications and to process and verify the personal information you supply to us. All software suppliers store any data in the UK and are subject to UK regulations including the UK Data Protection Regulations and are obliged to keep your details securely and use them only to fulfil the contracted service.

Marketing

We will seek your explicit consent to provide you with general market news and updates and to inform you of any products and services offered by ASSURED FUNDING LTD and its associated companies that are not connected with your specific mortgage, loan or other plan or service. If you use a service offered by ASSURED FUNDING LTD, you will not automatically be opted in to marketing without your consent. We will not provide your personal data to any unconnected third party in connection with marketing.

We will obtain explicit consent from you either verbally, via our website, via meetings face to face including shows and events, by email, or by completion of a consent form and will keep a record of your consent.

Marketing may include emails, telephone calls, social media and postal marketing. You can advise us of your preferences on how you would like us to provide marketing and the marketing content that is of most interest to you. You may update your preferences at anytime and you may also withdraw your consent at anytime.

Changes to our Privacy Policy

It may be necessary to update this privacy policy from time to time to meet legal, regulatory and commercial requirements. Please visit this page from time to time and take note of any changes. Any personal data collected prior to any change will not be affected by the change without your permission.

On the 25th May 2018, The Data Protection Act 1998 was superseded by The Data Protection Act 2018 supplemented by GDPR. This Privacy Notice sets out most of your rights under the new act but may be updated further if regulation changes in the future.

Changes of ownership

ASSURED FUNDING LTD may from time to time sell or transfer the control of the company. Any personal data supplied by you where relevant to the part of the business being sold or transferred will be transferred to the new owner or controlling party and will continue to be used under the terms of this policy for the purposes that the personal data was originally supplied to us.

Access

You have a right to access any personal information we hold about you. To request access or for any questions about this privacy policy please contact: ASSURED FUNDING LTD, 109 Maldon Road, Colchester, Essex CO3 3AX telephone 0808 123 1 321, email office@assuredfunding.co.uk

Complaints

How to contact the appropriate authority

Should you wish to report a complaint or if you feel that Our Company has not addressed your concern in a satisfactory manner, you may contact us via the process below. You can also complain to the Information Commissioner's Office at www.ico.org.uk

Assured Funding Ltd is an appointed representative of Connect IFA Ltd. Connect IFA Ltd is authorised and regulated by the Financial Conduct Authority.

We are committed to providing a professional service to all our customers.

If you are unhappy then we want to hear about it so we can try to put things right. With this in mind, we have the following complaints procedure in place.

You can make a complaint by any reasonable means including telephone, letter, or email.

Our contact information:

- Write to: Assured Funding Ltd
- Telephone: 0808 123 1 321
- Email: complaints@assuredfunding.co.uk

If you prefer, you can also refer your complaint to Connect IFA Ltd directly using the following contact details:

- in writing Write to Connect IFA Ltd Complaints Department 39 Station Lane, Hornchurch, Essex RM12 6JL
- by phone Telephone 01708 676135

How we will handle your complaints

Simplified Complaints

We will use this process if:

- your complaint is about a simple matter - that we can look into and solve quickly and easily; and
- you direct it to us (rather than directly to Connect IFA Ltd) in the first instance.

We will investigate your complaint and aim to resolve it within three business days following the date of receipt. If you are happy to accept our proposed resolution, we will send you written confirmation of our investigation.

If you cannot confirm acceptance by the end of the third working day (for example – because you are not happy with our proposed response or if you are not available to discuss it with us) then the case will be referred to Connect IFA Ltd. It will then be handled in line with the Formal Complaint process outlined below.

If your complaint is more complex or is unlikely to be resolved quickly then we will usually refer it to Connect IFA Ltd straight away

Formal Complaints

The formal complaints process will be used where:

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T: 0808 123 1 321 E: office@assuredfunding.co.uk W: www.AssuredFunding.co.uk Twitter / X: @assuredfunding

*Assured Funding Ltd is a private limited company registered in England and Wales (Company No: 07594318)
Registered Office; Assured Funding Ltd., 109 Maldon Road, Colchester, Essex CO3 3AX*

*Assured Funding Ltd is an appointed representative of Connect IFA Limited which is Authorised and Regulated by the Financial Conduct Authority.
Connect IFA Ltd's FCA Register Number is 441505. Assured Funding Ltd's FCA Register Number is 724232.
The FCA does not regulate Business Buy to let Mortgages and Commercial Mortgages to Limited Companies.*

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- we can't resolve your complaint to your satisfaction within 3 working days; or
- your complaint is likely to involve more complex assessment or investigations; or
- you send your complaint directly to Connect IFA Ltd rather than to us in the first instance; or
- you ask us to deal with your complaint in this way rather than via a simplified process.

Upon receipt CONNECT IFA LTD will acknowledge your complaint promptly and will investigate it fairly and impartially. They will write to you within 8 weeks to confirm the outcome of their investigation.

In the unlikely event that their investigation is not complete within eight weeks of receipt of your complaint they will write to you to explain why and let you know when you can expect to hear from them. They will also provide details of how to contact the Financial Ombudsman Service if you are not satisfied with progress.

The Financial Ombudsman Service

If, following CONNECT IFA LTD's investigation you are still not happy with the outcome you have a statutory right to refer your complaint to the Financial Ombudsman Service.

It is a service free of charge to consumers and you may refer the matter to the Financial Ombudsman Service (FOS) within six months from the date that you received a final response to your complaint.

You can contact the service using the following details: Telephone 0800 023 4567 Email: complaint.info@financial-ombudsman.org.uk

You can also visit their website and refer complaints to them online by visiting. <https://www.financial-ombudsman.org.uk/>

Let us know if you need any extra help or support.

We are committed to providing a complaints service that is accessible to all our customers.

If you will have any difficulties with any elements of the process that is outlined above, or if there are circumstances that might mean we need to change the way in which we handle your complaint then please let us know when you tell us about your complaint.