

# Privacy Policy

## **FPSB IRELAND PRIVACY POLICY**

Effective: 1<sup>st</sup> February 2023

This privacy policy tells you about the information we collect from you. In collecting this information, we are acting as a data controller and, by law, we are required to provide you with information about us, about why and how we use your data, and about the rights you have over your data.

### **Who we are**

We are FPSB Ireland (Financial Planning Standards Board Ireland DAC). Our address is 183a Kimmage Road West, Dublin 12. You can contact us by post at the above address, by email at [info@fpsb.ie](mailto:info@fpsb.ie) or by telephone on 01 4550150.

We are not required to have a data protection officer, so any enquiries about our use of your personal data should be addressed to the contact details above.

We process your personal information for the purposes of administering our relationship with you as a CERTIFIED FINANCIAL PLANNER™ professional and to provide you with our services such as managing and recording your events and/or training bookings, communicating with you about our activities and initiatives, and for related purposes.

### **How we use your information:**

#### **When you use our website – Cookies.**

When you use our website to browse our products and services and view the information we make available, a number of cookies are used by us and by third parties to allow the website to function, to collect useful information about visitors and to help to make your user experience better.

For more information about our use of cookies, please see our [Cookie Policy](#).

#### **When you complete a Register of Interest form as a student on the Graduate Diploma in Financial Planning (IOB) / Postgraduate Diploma in Business in Financial Planning (LIA).**

The Graduate Diploma in Financial Planning and Postgraduate Diploma in Business in Financial Planning are the education programmes that underpin the CERTIFIED FINANCIAL PLANNER designation in Ireland. As a student of either programme, you

will be invited to Register your Interest with FPSB Ireland so that you can be made aware of sittings of the professional examination that you must successfully complete in order to be considered for a licence to practice as a CERTIFIED FINANCIAL PLANNER professional.

Registering your Interest provides FPSB Ireland with permission to contact you in relation to its examinations. The personal information that we ask from you is your name, employer, mobile phone number and email address.

Your information is stored on our CRM system (on our premises) and backed up to our cloud servers, all of which are based within the European Union.

### **Registering to sit a CFP® examination.**

When you register with us to sit a CFP examination, you will already have provided us with your name, employer, mobile phone number and email address. The additional information we ask for when you register for a CFP examination is: a correspondence address, date of birth, educational qualifications and credit card information.

Your information is stored on our CRM system (on our premises) and backed up to our cloud servers, all of which are based within the European Union.

We will use your information to verify your credit card details for your exam registration. We will also send you a receipt via email and we may use your telephone number to contact you regarding your registration.

We require this information in order to process your payment, register you for the CFP examination and fulfil our contract with you.

Your card details are passed to a third-party payment processor (Stripe) who store your data in the EU on securely encrypted web servers in line with PCI level 3.2 certification. FPSB Ireland does not have access to your card details. FPSB Ireland does not retain your credit card information. If you submit your credit card information to us in writing (on a form or in an email) this is securely disposed of as soon as it is processed.

### **When making an application to be granted a CFP Licence.**

The additional information we ask for when assessing your application for a CFP licence is: confirmation of relevant professional qualifications and designations, evidence of relevant work experience, and credit card information.

Your information is stored on our CRM system (on our premises) and backed up to our cloud servers, all of which are based within the European Union.

We will use your information to verify your credit card details for your exam registration. We will also send you a receipt via email and we may use your telephone number to contact you regarding your registration.

We require this information in order to process your payment, accept your application to become a CFP Professional and fulfil our contract with you.

Your card details are passed to a third-party payment processor (Stripe) who store your data in the EU on securely encrypted web servers in line with PCI level 3.2 certification. FPSB Ireland does not retain your credit card information. If you submit your credit card information to us in writing (on a form or in an email) this is securely disposed of as soon as it is processed.

We keep your personal information for an indefinite period, as it relates to your certification history.

### **When you register to attend an event.**

When you register to attend an event, we will already have your personal data from the information provided to us during the process to acquire a CFP licence. The only additional personal information we ask you for in order to register you to attend your chosen event(s) is your credit card information.

Your information is stored on our CRM system (on our premises) and backed up to our cloud servers, all of which are based within the European Union.

Your card details are passed to a third-party payment processor (Stripe) who store your data in the EU on securely encrypted web servers in line with PCI level 3.2 certification. FPSB Ireland does not retain your credit card information. If you submit your credit card information to us in writing (on a form or in an email) this is securely disposed of as soon as it is processed.

We keep your personal information for an indefinite period, as it relates to your certification history.

### **For how long do we retain your information?**

We will retain your information for the duration of your CERTIFIED FINANCIAL PLANNER professional licence and for a period of six years thereafter. Depending on the nature of any ongoing relationship with you, this period of retention may be subject to change.

Upon termination of your licence we will only retain some identity data associated with the granting of your licence (First name, last name, data of birth) for contractual reasons.

## **Sharing your information**

### **Third Parties**

We take your privacy seriously and take every reasonable measure and precaution to protect and secure your personal data. We will not, without your consent, supply your data to any third party except where such a transfer is a necessary part of the activities that we undertake.

We use third-parties in some circumstances to provide certain services (e.g. Printing of Licences, Administration of Exams) and third-parties who process your data on our behalf do so in accordance with our strict instructions.

### **Find a CFP Professional**

As a CERTIFIED FINANCIAL PLANNER professional you have the option to add a listing to our Find a CFP professional directory on our web-site. Submitted entries are approved only if the data submitted is consistent with our records.

### **Your rights as a data subject**

By law, you can ask us what information we hold about you, and you can ask us to correct this information if it is inaccurate. If we have asked for your consent to process your personal data, you may withdraw that consent at any time.

If we are processing your personal data for reasons of consent or to fulfil a contract, you can ask us to give you a copy of the information in a machine-readable format so that you can transfer it to another provider.

If we are processing your personal data for reasons of consent or legitimate interest, you can request that your data be erased.

You have the right to ask us to stop using your information for a period of time if you believe we are not doing so lawfully.

Finally, in some circumstances you can ask us not to reach decisions affecting you using automated processing or profiling.

To submit a request regarding your personal data by email, post or telephone, please use the contact information provided above.

### **Your right to complain**

If you have a complaint about our use of your information, we would prefer you to contact us directly in the first instance so that we can address your complaint. However, you can also contact the Data Protection Commissioner via their website at [www.dataprotection.ie](http://www.dataprotection.ie) or write to them at:

Data Protection Commissioner, 21 Fitzwilliam Square South, Dublin 2, D02 RD28

### **Updates to this privacy policy**

We regularly review and, if appropriate, update this privacy policy from time to time, and as our services and use of personal data evolves. If we want to make use of your personal data in a way that we haven't previously identified, we will contact you to provide information about this and, if necessary, to ask for your consent.

We will update the Effective date at the top of this document each time it is changed.