Julius Bär

RESPECTING YOUR RIGHT TO PRIVACY

INFORMATION COLLECTED FOR MARKETING PURPOSES – Q&A

The following Q&A provides you with all the information you need to understand how we collect and manage your personal data for marketing purposes and before you become a client. If anything is unclear or you would like to change your communication preferences, please contact data.uk@juliusbaer.com.

What information will we collect about you?

Depending on your communication preferences we will collect your personal data to allow us to stay in touch. This might include data such as your name, phone number, address and/or email address and could also include your specific interests regarding private banking and wealth management products and services. Having this information means we will be able to provide you with relevant information via the communication method most appropriate to your needs. We will collect this information from you, but in some instances we may also obtain information from publicly accessible sources, such as LinkedIn, or third party research organisations (where they are lawfully able to provide this) to allow us to enhance the information we share with you.

How do we use and disclose your personal data?

The data we collect and store about you will be used to allow us to identify Julius Baer products and services that we believe may be suitable for your needs or will be of interest to you. To do this we may share your personal data with other members of the Julius Baer Group. We will never share your personal data with any third parties outside the Julius Baer Group for their marketing purposes.

How does Julius Baer approach the security of your personal data?

We take data privacy very seriously and you can rest assured that any personal data collected by us will be kept securely. Members of the Julius Baer Group use appropriate administrative, technical and physical measures to protect your personal data securely.

Does Julius Baer ever transfer your personal data to other countries?

Julius Baer is a global business so there is sometimes a need to transfer your personal data outside the UK. In the majority of cases we will only share personal data within the Julius Baer Group although occasionally we may do so with service providers who are not members of the Group but support us in our business, most notably the providers of IT services such as "cloud"-based data hosting services. Generally these will be located in the UK, EEA, Switzerland, Guernsey and other countries where the data protection laws are considered equivalent to those in the UK. If for any reason we share data with persons in other countries we will put in place arrangements with a view to ensuring your personal data is processed to the same standards.

Who will have access to your personal data?

Your personal data will be accessed and processed only by the personnel at Julius Baer International Limited and other members of the Julius Baer Group. We will also share your personal data with authorised third parties, such as our contractors, where needed for our own marketing purposes, and with auditors and regulators to comply with applicable law and regulations. We will never share your personal data with a third party for their marketing purposes.

What do you do if you want us to delete or change your personal data or marketing preferences?

You have the right to withdraw your consent to us marketing to you, restrict or object to how we use your personal data and to have your personal information deleted or corrected. If you decide that you do not want to receive information from us, or if you would prefer to receive information by a different means of communication, please do not hesitate to contact data.uk@juliusbaer.com and we will update your preferences. We will of course delete your personal information or correct any errors in the personal data we hold if you request us to do so. We may be obliged to keep some basic information to enable us to comply with the law – for example, so that we can record and comply with any request you make not to receive further marketing communications. You also have the right to request that we transfer your personal data to a third party.

How do you access your personal data?

You have a right to obtain a copy of the personal data we have collected about you. If you wish to obtain a copy, please contact data.uk@juliusbaer.com.

How long do we keep your personal data for?

We will keep your personal data for as long as you are still happy to receive marketing material from us. When you are no longer happy to receive that material, we will delete most of the information we hold about you. We will however keep a small amount of information about you to record the fact you no longer wish to receive information from us. We will keep that limited amount of information indefinitely to ensure we respect your wish not to be contacted by us.

How do you make a complaint regarding the use of your personal data?

Julius Baer International Limited is the controller of the personal data we collect about you and is regulated by the United Kingdom's Information Commissioner regarding out handling of personal data. If you have a complaint about how we handle your personal data please contact data.uk@juliusbaer.com. You are also entitled to complain to the Commissioner if you are dissatisfied with how we have handled your personal data. The Information Commissioner can be contacted on 0303 123 1113.

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