

Charity Bank aims to provide the highest standard of customer service at all times. But we recognise things do go wrong on occasion, in which case our customers may wish to complain.

Charity Bank views complaints as a valuable source of customer feedback and an opportunity to identify how it can improve its performance.

Our procedure is designed to ensure all complaints are dealt with fairly, consistently, efficiently and are resolved at the earliest opportunity.

Complaints that cannot be settled may be referred to the Financial Ombudsman Service (FOS). You can also complain to the Information Commissioner's Office (ICO) about the way we process your data.

Charity Bank will always treat your personal details with the utmost care and will never sell them to other companies.

To find out more about the types of personal data we may hold, why and how we process that data and the length of time we keep your data on file, please refer to the Privacy Notice on our website. It also details who else may be involved in the processing of your data (including reference to their privacy policies) and your rights as a data subject.

To change how we process your personal data, or if you would like this Privacy Notice in another format, please contact us as follows:

Email: gdpr@charitybank.org

Post: Data Protection, Charity Bank,
Fosse House, 182 High Street,
Tonbridge, Kent, TN9 1BE

Phone: 01732 441900

Online: www.charitybank/privacy

E-newsletter changes: All emails include an unsubscribe link. You may opt-out at any time.

Bank On Us...

...to protect your personal data

Our commitment to your privacy

There are some changes in data protection law, so we wanted you to know that we've updated our Privacy Notice. The new Privacy Notice will apply from 25th May 2018.

This leaflet summarises the contents of our Privacy Notice for business/charity savers.

You can take a look at our Privacy Notice on our website at any time.

Registered Office: The Charity Bank Limited, Fosse House, 182 High Street, Tonbridge, Kent TN9 1BE. Authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority No. 207701. Member of the Financial Services Compensation Scheme (FSCS). Company registered in England and Wales No. 4330018.

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Charity
bank
a bank for good

Charity Bank Business/Charity Saver

Types of personal data we would typically hold, in relation to any individual whose details are submitted to us during the application process or whilst the savings account is open:

- Name
- Address
- Email address
- Phone number
- Job title

We will process this personal data on the following grounds:

- to progress our **legitimate interests** - to respond to your initial enquiry; to send the nominated contact at your organisation information about our organisation, our products and services; to invite your nominated contact to relevant events to demonstrate the social return on your investment with us; and to open your account; and
- to fulfil our **contractual obligations** in relation to the savings account; to run and monitor the account.

We will use third parties in the processing of your data and more information is set out in our Privacy Notice.

We will process the personal data referred to above until the account is closed.

Once the account is closed we will reduce the amount of personal data we hold on file and will only process that data on the grounds of legitimate interests.

We may hold personal data for up to 12 years following closure of the account. This may seem a long time, but some information will need to be kept on file for audit purposes. In practice, shorter retention periods apply to certain personal data, as follows:

- where verification of ID has been provided, we will keep this for up to 6 years after account closure;
- we will not contact any individual with information about our organisation, products and services or invite you to our events beyond five years after account closure (other than where you have requested that we remain in contact after that period).

All individuals whose details are submitted to us during the application process or whilst the savings account is open are entitled to exercise their right as a data subject as follows:

- where personal data is being processed on the grounds of **contractual obligation** - you have the right to access that data; to request correction/rectification of records; to request deletion (to the extent that this will not adversely affect our ability to run and monitor the account(s)); to transfer the data to another provider - but you will have no right to object to or restrict processing which is necessary for us to run and monitor the account(s); and
- where personal data is being processed on the grounds of **legitimate interests** - you have the right to access that data; to request correction/rectification of records; to request deletion; to object to or restrict processing; but not to transfer the data to another provider.

You can exercise your rights at any time by contacting our Data Protection Lead at gdpr@charitybank.org

Our privacy commitment to you

We do: treat your personal details with utmost care and work hard to meet strict legal and regulatory requirements

We do: process your data lawfully and fairly and tell you how we are using your data

We do: collect your data only for stated purposes

We do: only ask for the personal data we need

We do: update your personal data promptly upon request

We do: keep your personal data in an identifiable form for no longer than necessary

We do: put in place safeguards to protect your personal data

We do: consider your privacy when we introduce new processes

We do: respect your rights as a Data Subject

We do not: sell your personal data to third parties