

Privacy Notice - Client Data Consent Form

Best practice dictates that you understand why we collect data from customers and how we use it. It also requires us to be clear with you how we share that data and our processes in managing and retaining the data on our systems.

We will always comply with Irish and European data protection legislation and you can see how we do this by reading our full Privacy Notice on our web (<http://www.myadviser.ie> – under the “More...” tab at the top of every page.

We process your data as it is necessary for the performance of our business and to provide clients valuable services they need. To provide you with relevant information, respond to your enquiries and requests for products and/or services we usually request that you provide us with information about yourself and your circumstances. Our Privacy Notice will inform you of the information we gather and how it is used. We take this privileged position very seriously and have always acted in our client’s best interest.

Once you have read and understood our Privacy Notice please print, complete and sign this form. Then either post it to us or scan and email it to us at info@myadviser.ie .

Enter Client Name
Enter Client Address

Data Controller
MyAdviser
11 Anglesea House
63 Carysfort Avenue
Blackrock
Co. Dublin

Date:

MyAdviser Privacy & Communication 'Opt In' Form

First Name	Surname

Date of Birth – DD/MM/YYYY

I Confirm I have read the MyAdviser Privacy Policy and am happy with its contents.	Y	N

Select the ways you are OK with us to Communicate with you *											
Email		Letter		Text/SMS		Phone - Home		Phone - Work		Phone - Mobile	
Y	N	Y	N	Y	N	Y	N	Y	N	Y	N

If we need to phone you when is that OK?											
Any Time		Morning		Afternoon		Evening		Weekends		Never	
Y	N	Y	N	Y	N	Y	N	Y	N	Y	N

I agree to MyAdviser Communicating with me using the methods selected above, in the following areas; Financial Facts, Special Offers, Tax Ideas, Fact Finding Data Requests, Regular Communication to Service Your Account and How to Get the Most out of our Service.	Y	N

If the Previous Answer was No, and you have business with MyAdviser then can we communicate with you to provide service and support for that business? Otherwise we cannot contact you at all.	Y	N

Financial Advisors regularly use Profiling of client data to provide advisory services and offer solutions. The main categories are Risk & Reward Profiling, Profiling for Marketing Purposes and Establishing Affordability. In most cases we need to do this to do our work. Are you OK with MyAdviser using your data to profile?	Y	N

Client Disclosure Requirements:

I/We confirm that the answers above reflect how I/We want to be communicated with and how I/we want our data used as per MyAdviser's Privacy Policy. I/we understand that I/we can opt out just as easily as I/we have opted in, by contacting MyAdviser at any time, identifying ourselves and informing MyAdviser of our changes.

Print Name and Sign

Print Name & Sign