



Wealthdash Ltd is an appointed representative of
Altor Wealth Management LLP who is authorised
and regulated by the Financial Conduct Authority.

WealthDash

| Privacy Notice
| Last updated 12th January 2026

www.wealth-dash.com

Privacy Notice

Why Do We Collect Data?

We collect information about you when you engage us for financial planning and investment management. This information will relate to your personal and financial circumstances. It may also include special categories of personal data such as data about your health, if this is necessary for the provision of our services.

We may need to gather personal information about your close family members and dependants in order to provide our service to you effectively. In such cases it will be your responsibility to ensure that you have the consent of the people concerned to pass their information on to us.

The primary legal basis that we intend to use for the processing of your data is for the performance of our contract with you. The information that we collect about you is essential for us to be able to carry out the services that you require from us effectively. Without collecting your personal data we'd also be unable to fulfil our legal and regulatory obligations. Where special category data is required we'll obtain your explicit consent in order to collect and process this information.

Who Might We Share Data With?

We won't share your information for marketing purposes with anyone outside of WealthDash. We may send your details to third parties such as professional services companies, product and platform providers, but only with your consent. Where third parties are involved we'll have a contract with them to ensure that the nature and purpose of the processing is clear, that they are subject to a duty of confidence in processing your data and that they'll only act in accordance with our written instructions.

We'll also use appropriate security measures to protect your personal data in transit. We will not send personal information across unsecured e-mail networks and will either password protect documents or transfer the information via secure upload.

To fulfil our obligations in respect of prevention of money-laundering and other financial crime we may send your details to third party agencies for identity verification purposes.

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For How Long & How Do I Access It?

We'll retain personal data which is necessary to provide services to you. We'll take all reasonable steps to keep your personal data up to date, throughout our relationship.

We're also subject to regulatory requirements to retain your data for specified minimum periods:

- Five years for investment business
- Indefinitely for pension transfers and opt-out business
- Three years for insurance business

These are minimum periods, during which we have a legal obligation to retain your records. We reserve the right to retain data for longer where we believe it's in our legitimate interests to do so. In any case, we'll not keep your personal data for longer than 10 years after our relationship with you has ended.

You have the right to request deletion of your personal data. We'll comply with this request, subject to the restrictions of our regulatory obligations and legitimate interests as noted above.

Where we cannot delete your data for regulatory reasons, we will restrict access to the data to our Data Protection Officer only.

You have the right to request a copy of the information that we hold about you. If you'd like a copy of some or all of your personal information please email or write to us using the contact details noted below.

When your personal data is processed by automated means, you have the right to ask us to move your personal data to another organisation for their use. We have an obligation to ensure that your personal information is accurate and up to date. Please ask us to correct or remove any information that you think is incorrect.

We will not contact you for marketing purposes, to sell additional services, but to keep you up to date on topics relevant to your portfolio and the service you receive from us. You can opt out of these communications at any time by contacting us.

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Cookies

We use cookies to track visitor use of the website and to compile statistical reports on website activity.

For further information visit <http://www.allaboutcookies.org>

You can set your browser not to accept cookies and the above website tells you how to remove cookies from your browser. Our website contains links to other websites.

This privacy policy only applies to us, so if you visit other websites you should read their own privacy policies.

Contact Us

If you are not happy with the way we have handled your data, have a query about this policy or your data please contact us:

info@wealth-dash.com

[+44 \(0\) 77 1567 0077](tel:+44207715670077)

Merry Tree Cottage

Plough Lane

Hazeley Lea

RG27 8ND

Reg. No. 12214330

You also have the right to complain to The Information Commissioner's Office:

[0303 123 1113](tel:03031231113) (local rate)

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Water Lane

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