



Taconis Advisors & Co. LLP Data Retention & Security Policy

Information we may collect from you

Taconis Advisors & Co. LLP ("TAC") use your Personal Data for a variety of reasonable and legitimate business purposes, including, but not limited to, the following:

- Complying with legal or regulatory obligations, such as our obligations regarding know-your-client and anti-money laundering;
- Performing a contract with you or to take steps at your request before entering into a contract, including to: (i) provide you with information regarding TAC services, (ii) assist you and answer your requests, (iii) evaluate whether we can offer you TAC services and under what conditions.

Other legitimate purposes, such as:

- Communicating with Data Subjects;
- Performing activities relating to client management, financial management and administration;
- Creating, improving and developing services;
- Conducting market research, surveys, and similar inquiries to help us understand trends, client and site visitor needs;
- Investigating and resolving disputes and security issues and enforcing our Terms of Use and other agreements;
- Monitoring and auditing compliance with internal policies and procedures, legal obligations and to meet requirements and orders of regulatory authorities and;
- Processing and considering applications for employment, including evaluating and confirming your suitability for the position and accuracy of any information submitted;
- To notify you about changes to our services.

Disclosure of your information

Although we will not sell personally identifiable information to third parties, we may share it with our agents, consultants and service providers who assist us in running our business and who are subject to security and confidentiality obligations.

We may also share the personal data we hold about you across TAC teams to enable us to better understand your needs and run your accounts in the efficient way that you expect. Your personal data may also be used by TAC for customer modelling, statistical and trend analysis, with the aim of developing and improving our services.

In addition, we also may disclose information about you (i) if we are required to do so by law or legal process, (ii) to law enforcement authorities or other government entities based on a lawful disclosure request, or (iii) when we believe disclosure is necessary or appropriate to prevent harm or financial loss, or in connection with an investigation of suspected or actual fraudulent or illegal activity.

Where we store your personal data

We store your personal data on our secure servers in the United Kingdom and retain it for a reasonable period or as long as the law requires.

Where we have given you (or where you have chosen) a password which enables you to access our site, management tools and reports, you are responsible for keeping this password confidential. We ask you not to share a password with anyone.

Safeguarding your personal data

TAC endeavour to protect your personal information. We maintain administrative, technical and physical safeguards designed to protect personal information we obtain from you against accidental, unlawful or unauthorized destruction, loss, alteration, access, disclosure or use. Please be aware though that no security measures are perfect or impenetrable. We will not be responsible or liable for any damages, losses or causes of action arising out of or in connection with the disclosure of your personally identifiable information.

International Data Transfers

Information that we collect from you, including via our website, may be stored, processed and transferred outside of the U.K. to enable us to provide you with services and/or to administer our relationship with you. Where your Personal Data is processed by third parties outside the U.K., we will ensure appropriate safeguards are in place to adequately protect it, as described in this online Privacy Policy.

Your Rights and Choices

Under the GDPR you have the right to request a copy of the personal information we hold about you. In particular, you may have the right to:

- Request access to any data held about you;
- Ask to have any inaccurate information corrected;
- Request data held about you to be deleted, provided the data is not required by TAC to perform a contract, defend a legal claim or to comply with applicable laws or regulations;
- Prevent or restrict processing of data which is no longer required;
- Request transfer of appropriate data to a third party where this is technically feasible.

If you have any questions regarding this Privacy Policy or your Personal Information, please send your request to TAC Data Protection Officer:

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73 Cornhill London
EC3V 3QQ
United Kingdom

Email: info@tacpartners.com