



General Data Protection Regulations (GDPR) statement: The RU Group as data processor for employers and pension scheme trustees

The RU Group is the collective brand of the Russell Ulyatt Group Limited which is made up of Russell Ulyatt Holdings Limited, Russell Ulyatt Financial Services Limited, Greenhalgh Financial Services Limited, Hart Shaw Financial Planning Limited, Shevill Parkes (Financial Services) Limited, Channack Ross Limited, Policy Trustees Limited and CH Trustees Limited.

This statement confirms our approach to GDPR for employers and trustees of pension schemes where we provide employee benefits services to the employer/trustees and where we have no personal advice relationship with individual employees or pension scheme members. **This document should be read in conjunction with our Privacy Notice.**

Where an employee or pension scheme member engages with us for the provision of individual financial advice, we will enter into a personal Client Agreement with them.

Our role to employers and pension scheme trustees

The RU Group is a processor of personal data under GDPR. We process data under instruction for employers and trustees of pension schemes.

The RU Group GDPR implementation

Our GDPR implementation summary, which confirms our compliance with GDPR, is available upon request.

Responsibility for communicating with employees or pension scheme members

The employer/trustee is responsible for providing their staff/members with information about the processing of personal data in general via their internal Privacy Notice.

This should include the sharing of their data with third parties, such as The RU Group, who provide services to the employer/trustees in the provision of their employee benefits package or pension scheme.

What is the legal basis for processing the data?

The employer/trustee as data controller needs to determine the legal basis for the processing of personal data within the scheme. In general, it will be to meet your obligations to provide employee benefits to fulfil contractual obligations or to run a pension scheme in line with the trust deed and rules. Sensitive or 'special category' data is usually processed under the occupational pensions public interest condition.

You should let us know if you are processing personal data under a different legal basis.

What data do we process?

We may process the following personal data:

- **Personal details:** name, gender, date of birth, national insurance number, marital status and contact details
- **Employment history:** employment dates and salary history
- **Partner and beneficiary details:** name, gender and date of birth
- **Health:** sufficient details relevant to employee or pension scheme benefits
- Other information required in respect of the employer or trustees to ensure the correct provision of employee or pension scheme benefits and to meet our regulatory obligations.

The following information is in addition to our Privacy Notice and relates specifically to employee and member data.

How will we help with subject access requests?

Employees/members have the right to find out what personal data is held about them. These are often referred to as subject access requests. We have the necessary procedures in place to deal with access requests in line with the requirements of GDPR. You should contact us as soon as possible if you receive such a request.

How will we deal with data breaches?

In the event of a personal data breach by us, we will notify you promptly and within 36 hours. We will support you in making any required notifications to the regulator and members.

How to contact us

Please contact us if you have any questions about our approach to GDPR.

By email at privacy@therugroup.com

Or write to us at:

The Compliance Manager
The RU Group
1 The Triangle
ng2 Business Park
Nottingham
NG2 1AE



0115 907 5100



info@therugroup.com



therugroup.com

