



Privacy Policy for Locke Financial Partners Ltd

Last Updated: January 2026

At **Locke Financial Partners Ltd**, we are committed to protecting and respecting your privacy. This policy explains when and why we collect personal information, how we use it, and how we keep it secure.

1. Information We Collect

We may collect and process the following data about you:

- **Identity Data:** Name, date of birth, and gender.
- **Contact Data:** Email address, phone number, and billing/home address.
- **Financial Data:** Bank account details and financial history (as required for our services).
- **Technical Data:** IP address, browser type, and usage data via cookies when you visit our website.

2. How We Use Your Information

We use your information to:

- Provide financial advice and management services.
- Comply with legal and regulatory obligations (e.g., Anti-Money Laundering checks).
- Send you requested information or marketing communications (where opted-in).
- Improve our website functionality and customer experience.

3. Data Retention

We will only retain your personal data for as long as necessary to fulfil the purposes we collected it for, including for the purposes of satisfying any legal, accounting, or reporting requirements.

4. Data Security

We have put in place appropriate security measures to prevent your personal data from being accidentally lost, used, or accessed in an unauthorised way. We limit access to your personal data to those employees and third parties who have a business need to know.

5. Your Legal Rights

Under data protection laws, you have rights including:

- **Access:** The right to ask us for copies of your personal information.
- **Rectification:** The right to ask us to correct inaccurate information.



- **Erasure:** The right to ask us to erase your personal information in certain circumstances.
- **Object/Restrict:** The right to object to or restrict the processing of your data.

6. Contact Details

If you have any questions about this privacy policy or our privacy practices, please contact us at:

Email: emma@lockefinancialpartners.co.uk