



GDPR Consent Form

October 2023

Who we are

Vita Planning is a firm of financial planners.

Data Protection

We collect and process your personal data (as such term is defined in the UK General Data Protection Regulation ('GDPR')) in the course of providing our services. We are a data controller (as the term is defined in the GDPR) of such personal data. Full details of how we process personal data can be found in our Privacy Notice, which is provided with our Client agreement.

We may collect and process personal data in relation to your health where you provide this either in a written application or by speaking with an adviser. This data will be collected and processed in accordance with our Privacy Notice and used solely for the purpose of researching and advising on one or more products to suit your needs and assisting you with the application for and ongoing management of such products. We may also pass this data to third party organisations of certain types, specifically:

- Best Practice IFA Group Limited
- Service providers necessary for the provision of our services
- Financial service providers
- Financial product providers
- Financial comparison platforms
- Financial applications such as cash flow modelling
- Electronic Identification provider

Any such sharing of data is expressly for the purpose of providing you with the best possible advice and financial outcomes. We do not pass your data to third party organisations for marketing purposes.

In order to collect and process this data, we require your consent by signing this GDPR Consent Form. This consent can be withdrawn at any time.

Please note that we cannot provide a full range of services without such consent, and withdrawal of consent is likely to require us to cease providing our services to you.

Please tick this box to confirm you understand and consent to our processing of personal data relating to your health and our passing such special category data to third-party organisations of the types listed above.*

Health information is important for most financial planning, and in some areas it is necessary such as mortgage, protection and drawing pensions benefits.

From time to time, we send our clients information promoting our services, or other similar services in which we believe you might be interested. If you would prefer not to receive this information, please tick the box below. Alternatively, please contact The Data Protection Officer on 01403 334455 or in writing at Broadlands Business Campus, Langhurst Wood Road, Horsham, West Sussex, RH12 4QP.

Please tick this box if you do not wish for us or any company associated with us to contact you for marketing purposes by e-mail, telephone, post or SMS.*

**Where client is under the age of 16 consent must be given by either the parent or legal guardian for this data to be processed.*

DATA PROTECTION CONSENT

Customer name(s) _____

Customer signature(s)* _____

Date _____