

Privacy Policy - The IFA VA

1. Who we are

The IFA VA provides outsourced operations and administrative support to financial advisers and wealth management firms in the UK and internationally.

For the purposes of data protection law, The IFA VA is the data controller of personal data collected through this website.

Contact: support@theifava.com

2. What information we collect

We may collect:

- Name
- Email
- Phone
- Business info
- Info submitted via forms/email

We collect this via forms, direct contact, or site interaction.

We may also collect:

- IP address
- Browser type
- Usage data

3. How we use your information

We use your data to respond to enquiries, manage relationships, and improve our services.

We rely on legitimate interest and consent where required.

4. Working with clients

Security Measures

The IFA VA implements appropriate technical and organisational measures to safeguard personal data against accidental loss, unauthorised access, disclosure, alteration or destruction.

These measures include, where appropriate:

- Access controls and restricted permissions
- Strong password management and multi factor authentication
- Secure cloud-based storage solutions
- Device and account security controls
- Confidentiality obligations
- Secure disposal of information

Personal data is only accessible to individuals who require access to perform their duties.

We may process personal data on behalf of financial advisers.

In these cases:

- We act on instructions
- We are not the controller
- We treat data as confidential

5. Data storage

We use secure systems and restrict access.

Retention:

Client records and business documentation are retained only for as long as necessary to fulfil contractual, legal, regulatory, insurance and professional obligations.

Where personal data is no longer required, it will be securely deleted, destroyed or anonymised.

6. Sharing data

We do not sell data. We may share with trusted providers under strict controls.

7. International data

Data may be processed outside the UK with appropriate safeguards.

8. Your rights

Under UK data protection law, you have the right to:

- Request access to the personal data we hold about you.
- Request correction of inaccurate or incomplete personal data.
- Request erasure of your personal data where there is no lawful reason for us to continue processing it.
- Request restriction of processing in certain circumstances.
- Object to processing carried out on the basis of legitimate interests.
- Request transfer of your personal data to another organisation where technically feasible and legally applicable.
- Withdraw consent at any time where processing is based on consent.

- Not be subject to a decision based solely on automated processing where such processing produces legal or similarly significant effects.

To exercise any of these rights, please contact us at:

support@theifava.com

Data Protection Concerns and Complaints

If you have a concern about how we collect, use, store or process your personal data, we encourage you to contact us first so that we can investigate and resolve the matter.

We take data protection seriously and maintain a documented process for receiving, investigating and responding to data protection complaints.

Complaints may be submitted by email to:

support@theifava.com

Full details of our complaints process can be found in our Data Protection Complaints Notice.

We will acknowledge complaints and investigate them in accordance with applicable UK data protection legislation.

If you remain dissatisfied after we have responded, you have the right to lodge a complaint with the Information Commissioner's Office (ICO).

Information Commissioner's Office
Wycliffe House
Water Lane
Wilmslow
Cheshire
SK9 5AF
Telephone: 0303 123 1113
Website: <https://www.ico.org.uk>

9. Cookies

We use cookies. See our Cookie Policy.

10. Updates

We may update this policy.

11. Contact

support@theifava.com