



Independent Financial Advice

Special Categories of Sensitive Personal Data

I give explicit consent for Nexus IFA Ltd, and In Partnership (a trading name of The Whitechurch Network Limited who act as our Principal for regulatory purposes), and On-Line Partnership Group Limited to process special categories of sensitive personal data* relating to me to:

Client Name	
Client Address	

I understand that you may pass this information on to a named product provider or contracted specialist provider, such as a paraplanning service, during the product application process. My sensitive personal data will be handled only by staff necessarily involved in these processes and at all times my sensitive personal data will be kept secure and confidential. Once my data has been passed to a named product provider, they will provide me with a privacy notice in respect of the processing they will carry out as a data controller in their own right. My data will be retained in line with the FCA's record keeping requirements.

I understand that my consent may be withdrawn at any time as outlined in the privacy notice.

A. Type of data you allow us to process	
Health Related*	Ethnic Origin* Other* (please specify) _____
B. Purpose	
To enable the provision of professional opinions and high quality recommendations, ensuring advice is suitable and meets compliance standards set by the Financial Conduct Authority (FCA) with the aim to recommend an application(s) for the specified product or products (e.g. life policy, etc.) listed below:	
C. Consent given Yes	
Please tick "Yes" to indicate you wish to give consent to our use of the information in sections A & B above.	
Signature:	Date:

* The UK GDPR defines Special category data as personal data which is more sensitive and refers to:

- personal data revealing racial or ethnic origin;
- personal data revealing political opinions;
- personal data revealing religious or philosophical beliefs;
- personal data revealing trade union membership;
- genetic data;
- biometric data (where used for identification purposes);
- data concerning health;
- data concerning a person's sex life; and
- data concerning a person's sexual orientation.

See: <https://ico.org.uk/for-organisations/uk-gdpr-guidance-and-resources/lawful-basis/a-guide-to-lawful-basis/lawful-basis-for-processing/special-category-data/>

V6-042024

Clear Concise Financial Advice