



# Privacy Policy

## 1. Who we are

Walter & Partners Ltd is a firm of independent financial planners.

Walter & Partners Ltd is the data controller responsible for your personal data.

If you have any questions about this policy or how we use your data, please contact:

**Email:** [info@walter-partners.co.uk](mailto:info@walter-partners.co.uk)

**In writing:** 20-22 Wenlock Road, London, N1 7GU

## 2. Scope of this policy

This policy explains how we collect and use personal data through our website.

If you become a client, you will be provided with a separate Client Agreement and Privacy Notice, which explains in detail how we process your data when providing financial planning services.

## 3. The data we collect

We may collect and process the following information:

- Name and contact details (if you contact us)
- Information you provide in emails or website forms
- Technical data (such as IP address, browser type and device)
- Website usage data (for example pages visited and time spent on the site)

We do not collect detailed financial or special category data through our website.

## 4. How we use your data

We use your data to:

- Respond to enquiries and communicate with you
- Provide information you have requested
- Maintain and improve our website
- Ensure the security of our systems

We do not use website data to provide financial advice.

## 5. Legal basis for processing

We rely on the following legal bases:

- Legitimate interests – to operate our website, respond to enquiries and improve our services
- Consent – where required, for example in relation to cookies

## 6. Marketing

We do not send unsolicited marketing communications through our website.

If you contact us, we will only use your details to respond to your enquiry unless you ask us to provide further information.

## 7. Cookies

Our website uses cookies to ensure it functions properly and to understand how it is used. You can control or disable cookies through your browser settings. Further information is set out in our Cookie Policy below.



## 8. Sharing your data

We do not sell your personal data. We may share limited data with trusted third parties who support the operation of our website, including:

- Website hosting providers
- IT and system support providers
- Website analytics providers

All third parties are required to process your data securely and in accordance with data protection law.

## 9. How long we keep your data

If you contact us but do not become a client, we will retain your data only for as long as necessary to respond to your enquiry. If you become a client, your data will be retained in line with our Client Agreement and regulatory obligations.

## 10. International transfers

Some of our service providers may process data outside the UK. Where this occurs, we ensure appropriate safeguards are in place in accordance with UK data protection law.

## 11. Your rights

You have the right to:

- Request access to your personal data
- Request correction of inaccurate data
- Request erasure of your data
- Object to or restrict processing
- Withdraw consent where applicable

You also have the right to complain to the Information Commissioner's Office (ICO): [www.ico.org.uk](http://www.ico.org.uk)

## 12. Data security

We take appropriate technical and organisational measures to protect your personal data.

## 13. Changes to this policy

We may update this policy from time to time. The latest version will always be available on this page. Last updated: 29 April 2026

## Cookie Policy

Our website uses cookies to improve your experience and to help us understand how the site is used.

### What are cookies?

Cookies are small text files placed on your device when you visit a website.

Types of cookies we use

### Essential cookies

These are necessary for the website to function properly.

### Analytics cookies

These help us understand how visitors use our website so we can improve it (for example, Google Analytics). We do not use cookies for advertising or profiling.

### Managing cookies

You can control or disable cookies through your browser settings.

Please note that disabling cookies may affect how the website functions.