

Privacy Notice for JH Lombard ACADEMY (Financial Education)

Your Personal Data – What Is It?

Personal data relates to a living individual who can be identified from that data. Identification can be made using the information alone or in conjunction with any other information in the Data Controller's possession or likely to come into such possession. The processing of personal data is governed by the General Data Protection Regulation 2016/679 (the "GDPR") and the Data Protection Act 2018.

Who Are We?

JH Lombard Ltd is the Data Controller ("we", "us"). This means we decide how your personal data is processed and for what purposes.

How Do We Process Your Personal Data?

We comply with our obligations under the GDPR by:

- Keeping personal data up to date.
- Storing and disposing of it securely.
- Not collecting or retaining excessive amounts of data.
- Protecting personal data from loss, misuse, unauthorised access, and disclosure.
- Ensuring appropriate technical measures are in place to safeguard personal data.

Personal Data We Collect from Students:

- Student identification documents (e.g., student ID or passport).
- Parents' or guardians' identification documents (e.g., passport) if the student is under 18.
- Proof of relationship between the student and their parent or guardian (e.g., birth certificate).
- Signed consent form from parents or guardians for students under 18.
- Proof of home address.
- Student's school email address.
- Parents' or guardians' email addresses.

We Use Your Personal Data for the Following Purposes:

- To deliver our financial education programmes, including arranging work placements for school and university students.
- To maintain contact with students who have provided their consent, sharing information about products and services that may be of interest to them.
- To keep students informed about our educational products, services, and activities.

What Is the Legal Basis for Processing Your Personal Data?

Article 6 Processing

- Consent of the Data Subject (e.g., where we are marketing to the public through an opt-in method).
- Processing necessary for the performance of a contract with the Data Subject or to take steps to enter into a contract (e.g., where we are engaged to provide educational products and services).

Article 9 Processing

- Explicit consent of the Data Subject (e.g., where we wish to inform individuals

- about events, news, or services).
- Processing necessary for the establishment, exercise, or defence of legal claims, or where courts are acting in their judicial capacity.

Sharing Your Personal Data

Your personal data will be treated as strictly confidential and will only be shared with:

1. **JH Lombard Ltd and relevant parties involved in our educational programmes and activities.** For example, when students are invited to visit a financial institution, their names may be provided to that third-party financial institution for registration purposes.
2. **Third-party data storage providers**, such as Microsoft, to securely manage and store your information.
3. **Legal or regulatory authorities**, where we are required to do so by law.

We retain your personal data only for as long as is reasonably necessary, specifically for the provision of agreed educational activities and programmes. Additionally, data may be retained to address legal claims or comply with regulatory obligations.

Your Rights and Your Personal Data

Unless subject to an exemption under the GDPR, you have the following rights with respect to your personal data:

- The right to request a copy of the personal data we hold about you.
- The right to request that we correct any personal data if it is found to be inaccurate or out of date.
- The right to request the erasure of your personal data where it is no longer necessary for us to retain it.
- The right to withdraw your consent to processing at any time.
- The right to request that the Data Controller provides your personal data to you, and where possible, transmits that data directly to another Data Controller.
- The right, in certain circumstances, to request a restriction on the processing of your personal data (e.g., where there is a dispute regarding its accuracy or processing).
- The right to object to the processing of your personal data.
- The right to lodge a complaint with the Information Commissioner's Office (ICO).

Further Processing

If we wish to use your personal data for a new purpose not covered by this Privacy Notice, we will provide you with a new notice explaining the new use before commencing processing. Where necessary, we will seek your prior consent to the new processing.

Contact Details

- **Email:** academy@jhlombard.co.uk
- **Address:** JH Lombard Ltd, 35 New Broad Street, London, EC2M 1NH
- **Information Commissioner's Office (ICO):**
 - **Phone:** 0303 123 1113
 - **Email:** [Contact ICO](#)
 - **Address:** Information Commissioner's Office, Wycliffe House, Water Lane, Wilmslow, Cheshire, SK9 5AF