

Westminster Abbey 1972 Retirement and Death Benefits Scheme

Privacy Notice – August 2023

This Privacy Notice has been issued by the Trustees and the Scheme Actuary of the Westminster Abbey 1972 Retirement and Death Benefits Scheme (the Scheme) to comply with the General Data Protection Regulation (GDPR), which came into effect on 25 May 2018. This document replaces any Fair Processing Notice issued under the Data Protection Act 1998. You do not need to take any action in respect of this notice.

Data controllers

The Trustees of the Scheme are John O'Brien, David Burden, Roger Mountford, David Stanton, John Neilson and James Rawlinson. The Scheme Actuary is Chris Ramsey FIA of Barnett Waddingham LLP.

In accordance with guidance issued by the Information Commissioner's Office (ICO), the Trustees and Scheme Actuary are considered "joint data controllers" (the holders, users and processors of personal data) for the purposes of the GDPR. The joint data controllers can be contacted as follows:

Westminster Abbey 1972 Retirement and Death Benefit Scheme
c/o Barnett Waddingham LLP
2 London Wall Place
London EC2Y 5AU
Email: WestminsterAbbey@barnett-waddingham.co.uk
Telephone: 0333 11 11 222

Use, transfer and storage of personal data

In the course of running the Scheme, we may require information from you in relation to your marital status (which may include the gender of your spouse or civil partner) and/or information about your (or your partner's) health. Such information will be used by the administrators to determine the benefits payable to you and your beneficiaries. In addition, we may hold any or all of the following items of personal information about you:

- Personal details including your name, National Insurance number, gender, age, date of birth, postal and/or email address and telephone number.
- Descriptions relating to your physical and mental health (to the extent that they are relevant to the calculation and payment of your benefits from the Scheme).
- Salary and data relating to investments and pension assets held outside of the Scheme (to the extent they are relevant for the calculation and payment of your benefits, or to the taxation of your benefits from the Scheme).
- Employment history, including employment dates and historic pay records.
- Bank account details for payment of benefit instalments, HMRC tax code.

Your personal data is provided to the data controllers by your employer or may be obtained directly from you. It is not publicly accessible data. The personal data collected relates to your employment and membership of the Scheme. Your personal data will be stored until such time as we no longer need it but in any event for not longer than 15 years after the date the Scheme is wound up.

The Trustees share your data with the Scheme's administrator (Barnett Waddingham LLP), Scheme Actuary, the sponsoring employer(s), and AVC providers. They may also share data with the Trustees' other professional advisers (including the Scheme Auditor and pension consultants), regulatory bodies (including, but not limited to, HM Revenue and Customs, the Department for Work and Pensions and the Pensions Regulator), insurers and where applicable, their counterparties (such

as reinsurers) and brokers who are typically involved in arranging such insurance for the purpose of purchasing annuities or other insurance products.

Your data may be shared by the Scheme's administrator with sub-processors for particular outsourced activities such as bulk printing jobs, confirmation of address/existence, offsite backup and archive. A comprehensive list of parties with whom data may be shared is set out in the Trustees' formal Data Mapping document, available on request in writing to the Data Controllers at the address above.

The Scheme administrators, on behalf of the Trustees, will use your personal data to ensure that the correct benefits can be paid to you and that your requests can be dealt with efficiently, in accordance with the Trustees' **legal obligation** to run the Scheme in accordance with the Trust Deed and Rules. The Trustees and/or administrators may contact you directly in order to provide relevant information, or to deal with your queries.

In addition, it is in yours and the Trustees' **legitimate interests** to use your personal information to:

- Keep up to date and accurate records about your membership of the Scheme, so that the correct benefits can be paid
- Undertake risk-management exercises, so that the risk your benefits are not paid is reduced
- Secure members' benefits with an insurer and/or a reinsurer
- Comply with the law, including regulations and guidance issued by the Pensions Regulator, so that you, the Trustee(s) and their advisers are not subject to legal sanctions which may impact benefits
- Efficiently manage the impact of any change to the legal status of the sponsoring company, so that your benefits are not adversely affected for example by a sale or company merger

The Scheme Actuary uses your personal data to advise the Trustees on the financial management of the Scheme. This advice helps to ensure the Trustees are able to meet their obligations to pay members' benefits, and is necessary to comply with obligations placed on them by legislation, including the Pensions Act 2004. The Scheme Actuary may also use your personal data in research which assists actuaries in providing this type of advice – for example, research into the mortality experience of pension scheme members in general. This may include the provision of personal data, anonymised as far as possible, to a recognised external authority, such as the Continuous Mortality Investigation (CMI) which investigates mortality experience on behalf of the IFoA. The Scheme Actuary will not pass your data to any third party without the prior agreement of the Trustees.

The Trustees do not expect your personal data to be directly transferred to another country unless you request for this to be done, but if any of the Scheme's providers or advisers do hold data that may be transferred outside of the European Economic Area the Trustees will ensure there are appropriate safeguards in place.

Your rights in relation to your data

The purpose of this Privacy Notice is to fulfil your right to be informed about the use of your data. In addition:

- You have the right to access your personal data. If you wish to request copies of your personal data please contact the Data Controller at the address above.
- You have the right to have your personal data rectified if it is inaccurate or incomplete.
- You have the right to have your personal data deleted or removed if there is no reason for its continued storage and processing.
- You have the right to object to your personal data being processed and to restrict the processing of your personal data in certain circumstances. While processing is restricted, the data controllers are permitted to store the personal data to ensure the restriction is respected in future. You will be informed if a restriction on processing is lifted.
- You have the right to lodge a complaint about the data controller with the ICO.

Please note that if you choose to exercise your rights to withhold data or insist on its deletion, then the Trustee(s) may not be able to perform their duties in relation to the Scheme, and your benefits could be affected. Further details about GDPR and your rights under GDPR can be found on the ICO's website at <https://ico.org.uk/>.