

Data subject data portability

Request form



Article 20 of the EU General Data Protection Regulation (Regulation (EU) 2016/679) (GDPR) grants you the right to receive a copy of certain personal data held by Sanlam UK Limited, Sanlam Life & Pensions UK Limited, Sanlam Financial Services UK Limited, Sanlam Wealth Planning UK Limited or English Mutual Limited, Sanlam Trustee Services UK Limited, Sanlam Private Investments UK Limited, Sanlam FOUR Investments UK Limited, Sanlam Securities UK Limited (as the case may be) (Sanlam), and the right to transfer that personal data to another organisation (data controller).

To ensure that both parties are clear, please submit this request either in writing via post or email to:

Client services
Sanlam
St. Bartholomews House
Lewins Mead
Bristol BS1 2NH

[E client.services@sanlam.co.uk](mailto:client.services@sanlam.co.uk)

We expect to respond to your request within one month of receipt of a fully completed form, together with proof of your identity. This time period is subject to our right, in certain circumstances, to extend for up to two months depending upon the complexity of your request.

We will use the information you provide on this form to respond to your request. For more information on how we use your personal data and your rights under the GDPR, see Sanlam's *Privacy statement* available at: www.sanlam.co.uk/Assets/PDFs/Literature/1860-Privacy-Statement-for-Sanlam-Clients.aspx.

Information we require from you

Section 1

Please provide the data subject's information in the space provided below. If you are making this request on the data subject's behalf, you should provide your name and contact information in section 3.

We will only use the information you provide on this form to identify you and the personal data you are requesting access to, and to respond to your request.

First and last name:	<input type="text"/>		
Any other names that you have been known by:	<input type="text"/>		
Home address:	<input type="text"/>		
	<input type="text"/>		
	<input type="text"/>	Postcode:	<input type="text"/>
Telephone:	<input type="text"/>	Date of birth:	<input type="text"/>
Email:	<input type="text"/>		

If you are a current or former employee of Sanlam, please provide your employee identification number and your approximate dates of employment:

Please provide other unique identifiers or related information to help us locate your personal data (for example, government identification number or customer account number):

Section 2

We require proof of your identity before we can respond to your access request. To help us establish your identity, you must provide identification that shows your **name, date of birth** and **current address**.

We accept a photocopy or a scanned image of one of the following as proof of identity:

- passport or photo identification such as a driver's license; or
- national identification number card, or birth or adoption certificate.

Please also attach a copy of a bank or credit card statement or utility bill showing your current address and dated within the last three months.

If you have changed your name, please provide the relevant documents evidencing the change.

If you do not have any of these forms of identification available, please contact Sanlam's data protection team at dataprotection@sanlam.co.uk for advice on other acceptable forms of identification.

We may request additional information from you to help confirm your identity and your right to access, and to provide you with, the personal data we hold about you.

We reserve the right to refuse to act on your request if we are unable to identify you.

Section 3

Please **ONLY** complete this section of the form with your name and contact details if you are acting on the data subject's behalf.

First and last name:

Any other names that you have been known by:

Home address:

Postcode:

Telephone:

Date of birth:

Email:

Confirmation of your identity

We accept a photocopy or a scanned image of one of the following as proof of identity:

- passport or photo identification such as a driving licence; or
- national identification number card, or birth or adoption certificate.

If you do not have any of these forms of identification available, please contact Sanlam's data protection team at dataprotection@sanlam.co.uk for advice on other acceptable forms of identification.

We may request additional information from you to help confirm your identity and your right to access, and to provide you with, the personal data we hold about you.

We also require proof of the data subject's identity before we can respond to the request. To help us establish the data subject's identity, you must provide the identification in section 2 above.

We accept a copy of the following as proof of your legal authority to act on the data subject's behalf:

- a written consent signed by the data subject;
- a certified copy of a power of attorney; or
- evidence of parental responsibility.

We may request additional information from you to help confirm the data subject's identity.

We reserve the right to refuse to act on your request if we are unable to identify the data subject or verify your legal authority to act on the data subject's behalf.

Section 4

Under Article 20, you have the right to receive a copy of certain personal data that you provided to us, or the right to transmit that personal data to another data controller, if we use automated means to process the personal data and we either:

- process the personal data with your consent; or
- process the personal data because it is necessary for us to perform a contract with you.

Personal data provided by you includes information that you knowingly and actively provided to us, such as:

- your name;
- contact information;
- username;
- age; and
- bank details.

Your data portability right does not apply to personal data we hold in paper files. It also does not apply to data inferred by or derived by us from the data provided by you such as data we generate by analysing your personal data.

Please tell us which Sanlam companies this request relates to:

In response to your request, we will provide you with a copy of the personal data covered by the Article 20 data portability right in a structured, commonly used and machine-readable format, or, we will transfer the relevant personal data to another data controller at your request if technically feasible.

If the information you request reveals personal data about a third party, we will either seek that individual's consent before responding to your request, or we will redact third parties' personal data before responding. If we are unable to provide you with a copy of your personal data because disclosure would violate the rights and freedoms of third parties, we will notify you of this decision.

Applicable law may allow or require us to refuse to act on your request, or we may have destroyed, erased, or made your personal data anonymous in accordance with our record retention obligations and practices. If we cannot provide you with a copy of or transfer your personal data to another data controller, we will inform you of the reasons why, subject to any legal or regulatory restrictions. If we determine that the personal data you are requesting a copy of is not subject to Article 20, we will inform you of this decision.

We will begin processing your data portability request as soon as we have verified your identity and have all of the information we need to locate your relevant personal data.

Section 5

I,

confirm that the information provided on this form is correct and that I am the person whose name appears in section 1 of this form. I understand that:

- (1) Sanlam must confirm proof of identity and may need to contact me again for further information;
- (2) my request will not be valid until Sanlam receives all of the required information to process the request; and
- (3) I am entitled to one free copy of the personal data I have requested, and acknowledge that for any further copies I request, Sanlam may charge a reasonable fee based on administrative costs.

Please indicate below whether you would like us to transfer a copy of your personal data to another data controller and provide the relevant information for the transfer.

Please transfer a copy of my personal data to:

by either:

- emailing a copy to them at:

- mailing a CD, DVD, or other physical media to:

Postcode:

- other (please specify):

Signature:

Date:

Section 6

To be completed by those acting on behalf of data subject

I,

confirm that I am authorised to act on behalf of the data subject. I understand that Sanlam must confirm my identity and my legal authority to act on the data subject's behalf, and may need to request additional verifying information.

Signature:

Date:

Sanlam Private Wealth and Sanlam Wealth are trading names of Sanlam Life & Pensions UK Limited (SLP), Sanlam Financial Services UK Limited (SFS), Sanlam Trustee Services UK Limited (STS), Sanlam Wealth Planning UK Limited (SWP), English Mutual Limited (EML) and Sanlam Private Investments (UK) Ltd (SPI). SLP is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority. SFS and SPI are authorised and regulated by the Financial Conduct Authority; EML is an appointed representative of SWP which is authorised and regulated by the Financial Conduct Authority.

Registered Office for SLP, SFS, STS, SWP, EML: St. Bartholomew's House, Lewins Mead, Bristol, BS1 2NH and for SPI: Monument Place, 24 Monument Street, London EC3R 8AJ. Each company is registered in England & Wales with the following registered number: SLP (00980142), SFS (02354894), STS (01489455), SPI (02041819), SWP (03879955) and EML (06685913).

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sanlam.co.uk