

Privacy Policy

AMR Financial Management takes the treatment and protection of your personal data very seriously. In particular;

- we will only collect personal data that is needed either to enable us to respond to your specific enquiry or to properly provide our financial, tax and/or investment advice to you. We will keep your personal data up to date when you tell us about changes to your circumstances.
- we will take appropriate and reasonable measures to keep your personal data secure and we will only use your data appropriately, reasonably and fairly.
- we will not share your personal data with other organisations (unless you ask us to) except for when it is absolutely necessary, when we are required to in order to comply with the rules imposed on us by the Financial Conduct Authority, or when it is a legal requirement or we are obliged to under the terms of a court order.
- we will not hold your personal data for any longer than we need to or are required to by the Financial Conduct Authority or by other government and/or regulatory bodies.
- we will make every reasonable effort to assist you to exercise your rights under the prevailing data protection legislation .

Our Privacy Policy applies to any personal data that we collect whether provided verbally in a face to face meeting, via the telephone, in writing, by email or by text message (or by any other electronic means). If you wish to have your personal data removed from our records please contact us and we will confirm that this has been done or explain clearly why it cannot be done (for example, because of regulatory or legal constraints).

In the unlikely event that you wish to complain about how we have used, shared or stored your personal data, or if you wish to view the information that we hold about you in our records, please contact;

The Data Protection Officer
AMR Financial Management Ltd
6 The Courtyard
London Road
Newbury
RG14 1AX

Telephone Calls

For your protection and so as to retain a record of telephone conversations, we are required to record all incoming and outgoing telephone calls. Recordings are kept secure by us for at least the minimum period that is required by law and/or by the Financial Conduct Authority.

Our Website

Our website does not use cookies and does not collect personal information about you except for any information (such as your name and email address) that you may enter voluntarily with the aim of asking us to respond to you. We do, however, collect anonymous statistics about the use of our website where the user is not individually identified.