

# The Sir Robert McAlpine Limited Staff Pension and Life Assurance Scheme

## **PRIVACY NOTICE – Members of the Sir Robert McAlpine Limited Pension and Life Assurance Scheme (the “Scheme”)**

### **1 What is the purpose of this document?**

The Sir Robert McAlpine Limited Pension and Life Assurance Scheme is a "data controller" meaning that we are responsible for deciding how we hold and use personal information about you.

You are being sent a copy of this privacy notice because you are a member of the Scheme by way of being a current member, deferred member or pensioner. This document makes you aware of how and why your personal data will be used, namely for the purposes of administering and making contributions into and payments from the Scheme, and how long it will usually be retained for. It provides you with certain information that must be provided under the General Data Protection Regulation ((EU) 2016/679) (“**GDPR**”). The GDPR comes into force in May 2018, which is why we are writing to you.

### **2 Data Protection Principles**

We will comply with data protection law and principles, including the GDPR. Your data will be:

- used lawfully, fairly and in a transparent way;
- collected only for valid purposes that we have clearly explained to you and not used in any way that is incompatible with those purposes;
- relevant to the purposes we have told you about and limited only to those purposes;
- accurate and kept up to date;
- kept only as long as necessary for the purposes we have told you about; and
- kept securely.

### **3 The kind of information we hold about you**

In connection with your Scheme membership, we will collect, store, and use the following categories of personal information about you:

- details of your employment, including salary information;
- information provided on your pension documentation, including name, title, current address, telephone number, personal email address, date of birth, bank details, beneficiary details;
- information provided to us since joining the Scheme (e.g. changes in pension contributions and investment choices);
- details of any transfers of funds in or out of the Scheme including bank details, schemes from which transfers were made into or from, details of Independent Financial Advice taken (in certain circumstances); and
- death, birth and marriage certificates where relevant.

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We may also collect, store and use the following "special category" of more sensitive personal data:

- information about your health, including any medical condition, health and sickness records (only where they affect contributions into the Scheme or the payment of benefits).

#### **4 How we will use information about you**

We will use the personal information we collect about you to:

- deduct pension contributions from your salary whilst you are an active member of the Scheme;
- instruct our authorised third party service providers to operate and administer the Scheme (including, where applicable, the payment of pensions);
- communicate with you about the Scheme;
- keep records relating to the Scheme; and
- comply with legal or regulatory requirements.

In carrying out the above, and by instructing authorised third parties, we are fulfilling our, and your employer's, legal contract with you to meet the obligations with regards to the Scheme.

#### **5 If you fail to provide personal information**

If you fail to provide, when requested, information which is necessary for us to operate the Scheme, we may not be able to administer your benefits successfully.

#### **6 How we use sensitive personal information**

We will use your sensitive personal information in the following ways:

- in the case of any medical history, to confirm any periods of time where contributions were reduced (e.g. when maternity leave was taken or a period of sick leave was taken);
- health details will be maintained where benefits are paid early (before the statutory minimum age limit) for health reasons; and/or
- appropriate certificates and other relevant documentation will be maintained to support the payment of a pension or lump sum to a beneficiary.

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### 7 **Data sharing - Why might the Scheme share my personal information with third parties?**

We will only share your personal information with the following third parties for the purposes of operating the Scheme: your employer, Capita Employee Benefits Ltd, NorthgateArinso UK Ltd, FIL Life Assurance Ltd, Paymaster (1836) Ltd (trading as Equiniti) and other authorised third parties which, at our request, are involved in projects which need member-specific information. Other third-party requests are only used for exercises to identify possible benefit amendments and not for marketing purposes. All of our third-party service providers are required to take appropriate security measures to protect your personal information in line with our policies. We do not allow our third-party service providers to use your personal data for their own purposes. We only permit them to process your personal data for specified purposes and in accordance with our instructions.

### 8 **Data security**

We have put in place appropriate security measures to prevent your personal information from being accidentally lost, used or accessed in an unauthorised way, altered or disclosed. In addition, we limit access to your personal information to those employees, agents and other third parties who have a business need to know. They will only process your personal information on our instructions and they are subject to a duty of confidentiality.

We have put in place procedures to deal with any suspected data security breach and will notify you and any applicable regulator of a suspected breach where we are legally required to do so.

### 9 **Data retention**

#### **How long will the Scheme use my information for?**

We will retain your personal information for as long as your pension, or fund, is active, including payment of a beneficiary's pension, and for a period of 6 years after the pension is no longer payable. Details are maintained even where a member transfers out from the Scheme in case of queries arising in the future. Further to that, we securely archive your personal information, but retain it indefinitely in case of future queries (including regulatory queries).

### 10 **Rights of access, correction, erasure, and restriction - Your rights in connection with personal information**

Under certain circumstances, by law you have the right to:

- **Request access** to your personal information (commonly known as a "data subject access request"). This enables you to receive a copy of the personal information we hold about you and to check that we are lawfully processing it.
- **Request correction** of the personal information that we hold about you. This enables you to have any incomplete or inaccurate information we hold about you corrected.

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- **Request erasure** of your personal information. This enables you to ask us to delete or remove personal information where there is no good reason for us continuing to process it. You also have the right to ask us to delete or remove your personal information where you have exercised your right to object to processing (see below).
- **Object to processing** of your personal information where we are relying on a legitimate interest (or those of a third party) and there is something about your particular situation which makes you want to object to processing on this ground. You also have the right to object where we are processing your personal information for direct marketing purposes.
- **Request the restriction of processing** of your personal information. This enables you to ask us to suspend the processing of personal information about you, for example if you want us to establish its accuracy or the reason for processing it.
- **Request the transfer** of your personal information to another party.

If you want to review, verify, correct or request erasure of your personal information, object to the processing of your personal data, or request that we transfer a copy of your personal information to another party, please contact: Kevin Pearson, Pensions Manager, Sir Robert McAlpine Limited, Eaton Court, Maylands Avenue, Hemel Hempstead, Hertfordshire, HP2 7TR in writing or by email to [k.pearson@srm.com](mailto:k.pearson@srm.com).

### 11 Complaints

You have the right to make a complaint at any time to the Information Commissioner's Office (ICO), the UK supervisory authority for data protection issues.

### THE TRUSTEES