

alpha beta
partners

Privacy Policy

Privacy Notice

Alpha Beta Partners is a trading name of AB Investment Solutions Limited, which is registered in England and Wales (no. 09138865), and authorised and regulated by the Financial Conduct Authority. This privacy notice explains how we use any personal information we collect about you.

What information do we collect about you?

Information is collected upon engagement with Alpha Beta Partners regarding our discretionary fund management and investment management services. We may also collect information when feedback is provided to us, or on completion of client surveys.

Personal information is defined as information which can be used to identify an individual and includes names, contact information and IP addresses.

Why do we need to collect and use your personal data?

It is a legal and regulatory requirement that we collect personal data to carry out our contract with you effectively.

Should we be required to collect what is termed as 'special category data', meaning data concerning but not limited to health, race, ethnicity, or religious beliefs, we will obtain your explicit consent to collect and process this information.

How will we use the information about you?

The information collected will be used to provide you with the services for which you engage us and to maintain compliance with regulatory requirements.

Who might we share your information with?

To deliver our services to you in an effective manner, we share your information with trusted third parties we have established contracts with for their legal, accountancy, identity verification and professional compliance services; as well as with product and platform providers used to arrange financial products on your behalf. Where information is shared with a third party, they are subject to a duty of confidence in the processing of your data, and they will only act in accordance with our strict written instructions.

Where necessary for personal data to be forwarded to a third party, appropriate security measures are taken to protect information in transit.

How long do we keep hold of your information?

We will only retain your personal data for as long as necessary to fulfil the purposes for which we collected it, including for the satisfaction of legal and regulatory requirements. We will take all reasonable steps to ensure that this information remains up to date throughout your engagement with us.

We reserve the right to retain data for longer where we believe it is in our legitimate interests to do so.

How can I see the information you hold about me?

You have the right to request a copy of the information we hold for you. To request this data, please email or write to us using the information below.

We have an obligation to ensure that your personal information is accurate and up to date. Please ask us to correct or remove any information that you think is incorrect.

Marketing

If you agree to receive marketing information from us, we may contact you regarding other products or services that we think may be of interest to you. We will not share this information with any external parties.

You have a right to at any time opt-out of the receipt of marketing information from us, or any third party. You can do this by contacting us via email or post.

Cookies

Our website uses cookies to track visitor use and to compile statistical reports on site activity.

You can set your browser not to accept cookies, however, in a few cases, some of our website features may not function as a result. For further information visit <http://www.allaboutcookies.org>.

Other Websites

There are links on our website to external websites. Please be advised that this privacy policy only applies to Alpha Beta Partners' website, and any third party will have their own privacy policy.

What can I do if I am unhappy with how my personal data is processed?

If for whatever reason you are dissatisfied with the information gathered or the way in which it is stored, you have the right to lodge a complaint with the supervisory authority for data protection. In the UK, this is the Information Commissioner, who's contact details can be found on the following website: <https://ico.org.uk/make-a-complaint/>.

Changes to our privacy policy

Our privacy policy is reviewed regularly, and we will inform you of any changes that may occur. This privacy policy was last updated in February 2025.

How to contact us

We can be contacted via post at: AB Investment Solutions Limited, Northgate House, Upper Borough Walls, Bath, BA1 1RG, or via email at compliance@abisl.co.uk.



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www.alphabetapartners.co.uk