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## PRIVACY POLICY

Address: Dowgate Hill House, 14-16 Dowgate Hill, London, EC4R 2SU

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iQuoto LTD is an appointed representative of Kapwealth LTD, which is authorised and regulated by the Financial Conduct Authority

## INTRODUCTION

iQuoto is committed to safeguarding all personal information that you as a client provide to us. This Privacy Policy describes how we as a company handle and protect personal information we collect about individuals and corporate clients who apply for, or receive, our products and services.

Under the terms of the GDPR/Data Protection Act 2018, you are entitled to a copy of the personal data held by us on payment of a £20 fee - to cover the cost of locating, retrieving, reviewing and copying any material requested.

## PERSONAL INFORMATION

When you apply for or maintain an account with iQuoto, we collect personal information about you for business purposes, such as evaluating your financial needs, processing your requests and transactions, informing you about products and services that may be of interest to you, and providing customer service.

The personal information we collect about you may include the following items listed below:

Application information:

If you are opening an individual account with us we will request the following information:

- Name,
- Address,
- Date of birth,
- Government Issued Identification (passport, driver's licence etc;)
- Occupation, assets, and income.

If you are opening a corporate account with us, we may in addition to the above, require the following information:

- Name of beneficial owners
- Certificate of Incorporation
- Articles of Association
- Shareholder information
- Names of authorised signatories and their position in the company.

Transaction information:

Information about your transactions with us and with our affiliates as well as information about our communications with you.

Examples include your account balances, trading activity, your inquiries, and our responses.

- Verification information: Information necessary to verify your identity, such as a passport or driving license. UK Money Laundering Regulations require us to collect information and take actions necessary to verify your identity.

Examples also include background information about you, which we receive from public records, or from other entities not affiliated with iQuoto.

### **iQuoto Ltd**

Dowgate Hill House, 14-16 Dowgate Hill, London, EC4R 2SU. United Kingdom

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IQUOTO LTD (FRN. 826970) IS AN APPOINTED REPRESENTATIVE OF KAPWEALTH LTD, WHICH IS AUTHORISED AND REGULATED BY THE

FINANCIAL CONDUCT AUTHORITY – FRN. 590782

Registered in England & Wales No. 11001513

## SECURITY TECHNOLOGY

iQuoto uses Secure Socket Layer (SSL) encryption technology to protect certain information that you submit. This type of technology protects you from having your information intercepted by anyone other than iQuoto while it is being transmitted to us. We work hard to ensure that our websites are secure and that they meet industry standards. We also use other safeguards such as firewalls, authentication systems (e.g.; passwords and personal identifications numbers), and access control mechanisms to control unauthorized access to systems and data.

## SHARING INFORMATION WITH OUR AFFILIATES

We may share personal information described above with our affiliates for purposes, such as, but not limited to, servicing customer accounts and informing customers about new products and services, or to aid in the trading activity of the company, its affiliates, or employees, as permitted by applicable law.

Our affiliates may include companies controlled or owned by us, as well as companies that have an ownership interest in our company.

The information we share with affiliates may include any of the information described above, such as your name, address, trading and account information. Our affiliates maintain the privacy of your information to the same extent iQuoto does in accordance with this policy.

## SHARING INFORMATION WITH THIRD PARTIES

iQuoto does not disclose your personal information to third parties, except as described in this policy.

Third party disclosures may include sharing such information with non-affiliated companies that perform support services for your account or facilitate your transactions with iQuoto, including those that provide professional, legal, or accounting advice to iQuoto.

Non-affiliated companies that assist iQuoto in providing services to you are required to maintain the confidentiality of such information to the extent they receive it and to use your personal information only in the course of providing such services and only for the purposes that iQuoto dictates.

We may also disclose your personal information to the third parties to fulfil your instructions or pursuant to your expressed consent.

We want you to know that iQuoto will not sell your personal information.

## REGULATORY DISCLOSURE

Under limited circumstances, iQuoto may disclose your personal information to third parties as permitted by, or to comply with, applicable laws and regulations.

For example, we may disclose personal information to cooperate with regulatory authorities and law enforcement agencies, to comply with subpoenas or other official requests, and as necessary to protect our rights or property.

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Except as described in this privacy policy, we will not use your personal information for any other purpose, unless

- We describe how such information will be used at the time you disclose it to us, or
- We obtain your permission.

### **OPT OUT**

You are not required to supply any of the personal information that we may request. However, failure to do so may result in us being unable to open or maintain your account, or to provide services to you. While we make every effort to ensure that all information, we hold about you is accurate, complete, and up to date, you can help us considerably in this regard by promptly notifying us if there are any changes to your personal information.

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