

## **SAFWAY PENSION SCHEME**

### **Personal information and what we do with it**

This data privacy notice explains how your personal information is processed in connection with the Scheme by Safeway Pension Trustees Limited (the "Trustee", "we" or "us"). The Trustee of the Scheme needs certain personal information about you to run the Scheme and pay benefits.

In legal terms, the Trustee is a 'data controller' in respect of this information. This means that we need to tell you some things about the personal information we have, the processes in place to protect it and what your rights are in relation to it.

The Trustee takes your privacy seriously. We are committed to complying with the UK General Data Protection Regulation ("GDPR") and all other applicable data protection and privacy laws to ensure we properly protect your personal information (i.e. information that relates to you).

We will be the Controller of your personal information (as we are responsible for how your personal information is used) together with some third parties who assist us with the Scheme.

Please take the time to read this privacy notice as it explains how we collect, use and store your personal information, and the rights you have in relation to the protection of your personal information (further information on your rights is included below).

If, at any time, you have any concerns about how your personal information is being processed by us, please let the Trustee know – you can find the contact details at the end of this notice.

### **What personal information we have**

We normally hold some or all of the following types of personal information:

- Your name, gender, date of birth, national insurance number and bank account information (where benefits are in payment).
- Contact details (including your address, phone number and email address).
- If your benefits from the Scheme derive from your employment, details of your employer when you were building up benefits in the Scheme, how long you worked for them and your salary and other benefits from time to time.
- Whether you are married or in a civil partnership and other information we might need to pay any benefits due on your death (for example, details of any dependants and/or potential beneficiaries).
- If your benefits from the Scheme form part of a divorce settlement, details of that settlement.

We may sometimes process other personal information about you. This could include information about your health where it is relevant to, for example, an ill-health early retirement request, or details about personal relationships to determine who should receive benefits on your death. We might also, very rarely, process information about criminal convictions and offences, but only where it is relevant to the payment of Scheme benefits.

Some of the information we collect or receive is classed as a special category of personal data. These types of personal information are more sensitive, for example, concerning your health, racial or ethnic origin or sexual orientation. If the Trustee asks you for other personal information in the future (for example, about your health), it will explain whether you have a choice about providing it and the consequences of not providing it. Where your consent is required, you may withdraw your consent at any time.

### **Where we get personal information from**

Some of the personal information the Trustee has comes directly from you. In addition, [Hymans Robertson], who administers the Scheme on behalf of the Trustee, may have obtained information from you and passed it to the Trustee.

Where you provide information about third parties such as your spouse, civil partner, co-habitee and/or children (for example, when completing or updating an expression of wish form / death benefit nomination form), you should inform the relevant person that you are doing this and share a copy of this notice with them so that they also understand how this information is processed.

Sometimes the Trustee gets personal information from other sources: for example, from your employer / former employer (for information such as your salary and length of service); from another scheme if you have transferred benefits into the Scheme from that scheme; from government departments such as HMRC and the DWP; and from publicly accessible sources (e.g. the electoral

roll) if the Trustee has lost touch with you and is trying to make contact with you. The Trustee may in turn pass this to third parties who provide services in connection with the running of the Scheme.

### **Why we hold personal information and how we share it**

The Trustee must by law provide benefits in accordance with the Scheme's governing documentation and must also meet other legal requirements in relation to the running of the Scheme.

The Trustee will use your personal information to comply with these legal obligations, for the exercise or defence of legal claims, and to prevent and detect crimes such as fraud. The Trustee may need to share your personal information with other people for this reason, such as courts and law enforcement agencies.

The Trustee also has a legitimate interest in administering the Scheme properly. This includes (but is not limited to): paying benefits as they fall due; checking your identity to comply with the Trustee's legal and regulatory requirements; making investments (including the purchase of insurance / annuity contracts); communicating with you; and ensuring that correct levels of contributions are paid, benefits are correctly calculated and the expected standards of Scheme governance are met (including standards set out in guidance and codes of practice issued by the Pensions Regulator).

In order to achieve this, the Trustee may share your personal information with various people, including: any new trustees or trustee directors; the Scheme employers / former employers; the Scheme administrators; the Trustee's professional advisers; auditors; insurers; HMRC; the Pensions Ombudsman; and IT and data storage providers and other service providers. If your benefits are transferred to another scheme, the Trustee will also need to provide the administrators of that scheme with personal information about you.

The Trustee does not generally rely on your consent as the legal basis for processing your personal information. When the Trustee needs to process information about your health (or other sensitive personal information), it may ask for your consent. However, there may be some circumstances where it has a legal basis for processing such information without consent (e.g. where the Trustee must process your personal data to comply with its legal obligations including in relation to properly administering the Scheme and for its legitimate interests). You can withdraw your consent at any time where the Trustee is relying on your consent to process your personal information by contacting the Trustee using the contact details given below. This may affect the Trustee's ability to administer your Scheme benefits.

The Trustee may also share your personal information with third parties where you have given your consent – for example, where you transfer your benefits out of the Scheme.

The Scheme employers hold personal data to comply with their legal obligations as sponsoring employers of the Scheme and to provide support in respect of the Scheme. The employers have a legitimate interest in the Scheme being run in a cost-effective way and may have an interest in offering certain options to Members. The Trustee may share your personal information with the Scheme employers for these legitimate purposes including: for employment administration purposes, payroll purposes, in connection with business audits, compliance with law, and to enable the employers to provide you with information about any additional options which may be available to you in relation to your Scheme benefits.

### **How to contact the other people we give your personal information to**

Some of the people mentioned above just use your personal information in the way we tell them – they process the personal information on the Trustee's behalf (e.g. the Scheme's administrator). However, others may make their own decisions about the way they use this information to provide their services, perform their functions, or comply with their own legal or regulatory requirements. In such cases, they have responsibilities as data controllers in their own right. This means that they are subject to the same legal obligations as us in relation to your personal information, and the rights you have in relation to your information apply to them too. Information about how these third parties process your personal data may be provided on the relevant party's website. If you require further information, please contact the Trustee via Hymans Robertson using the contact details set out below.

### **How long we keep your personal information for**

We need to keep some of your personal information long enough to make sure that we can satisfy our legal obligations in relation to the Scheme and pay any benefits due to or in respect of you.

We keep your personal information for long enough to ensure that, if a query arises in the future about your benefits, we have enough information to deal with it. The majority of the personal information that we hold will be retained for such period as is reasonably necessary for the proper running and administration of the Scheme and the performance of the Trustee's legal obligations and the pursuit of its legitimate interests. The Trustee's current retention policy is that personal information will be retained by the Scheme for so long as you are entitled or may become entitled to benefits under the Scheme, and, because trustees of pension schemes can commonly face complaints or questions from members, former members, other individuals or regulatory authorities many years after a member / beneficiary has ceased to be entitled or prospectively entitled to benefits, some personal information may need to be kept indefinitely. However, the Trustee will not retain personal information for longer than is necessary having regard to the purpose for which it is held. The Trustee will keep this data retention policy subject to review and may update it from time to time to ensure it remains appropriate.

### **Your rights in relation to your personal information**

You have rights in relation to the personal information we have about you. You have the right to:

- make a request to have your personal information corrected if it is inaccurate, and completed if it is incomplete;
- in particular circumstances, restrict the processing of your personal information;
- in particular circumstances, ask to have your personal information erased;
- request access to your personal information and to obtain information about how we process it;
- in particular circumstances, move, copy or transfer your personal information;
- in particular circumstances, object to us processing your personal information;
- not be subject to automated decision-making including profiling where it produces legal or other significant effects on you

You can exercise all of these rights free of charge except in some very limited circumstances, and we will explain these to you where they are relevant.

To exercise these rights, please use Hymans Robertson contact details, which are set out below. Hymans Robertson can also supply more information about these rights to you, on request.

### **Keeping your personal information safe**

It is the Trustee's policy to protect your right to privacy and it will ensure that adequate technical and security measures, confidentiality obligations and compliance procedures are at all times in place to prevent inappropriate access to, alteration or deletion of personal information. While no measure is impenetrable, we do our best to ensure your personal information remains safe.

When we pass your personal information to a third party, we seek to ensure that they have appropriate security measures in place to keep your personal information safe and to comply with general principles in relation to data protection.

Some of the people we share your personal information with may process it overseas. This means that your personal information may on occasion be transferred outside the UK and the European Economic Area. Some countries already provide adequate legal protection for your personal information, but in other countries, additional steps are taken to protect it.

You can contact us for more information about the safeguards we use to ensure that your personal information is adequately protected in these circumstances (including how to obtain copies of this information).

### **Queries and further information**

If you want more information about what we do with your personal information and what your rights are, please contact the Trustee via Hymans Robertson at: One London Wall, London, EC2Y 5EA; 020 7082 6270; TMclient@hymans.co.uk

If you have concerns about the way we handle your personal information, you can contact the Information Commissioner's Office or raise a complaint at [www.ico.org.uk/concerns](http://www.ico.org.uk/concerns), or call its helpline on 0303 123 1113. However, we would encourage you to raise these with us first so we may seek to resolve any concerns / answer any queries in the first instance.

### **Changes to this notice**

Any changes we make to this notice in the future will be available on request from Hymans Robertson and an up-to-date version will be available on the Scheme's website which can be accessed <https://www.tmpensions.co.uk/website-privacy-policy/>. Please check for any changes if you are using a printed copy of this notice.

Date: 24 February 2024

**Issued by Safeway Pension Trustees Limited (the Trustee of the Scheme)**