

# Privacy Notice Summary

March 2022



# Essex Pension Fund

## Privacy Notice Summary

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### Introduction

As the Administering Authority of the Fund we hold certain information about you and from which you can be identified (“personal data”) which we need to administer the Fund.

In this Privacy Notice, we have summarised some of the key ways in which we collect and use personal data in accordance with our requirements under data protection legislation. Further information can be found in the Full Privacy Notice which is available on our website [www.essexpensionfund.co.uk](http://www.essexpensionfund.co.uk)

It is important that you read this Privacy Notice together with any other privacy notice or fair processing policy we may provide on specific occasions when we are collecting or processing personal data about you so that you are fully aware of how and why we are using your data. This Privacy Notice replaces any general privacy notice we may have previously issued and supplements any other notices and privacy policies we issue that are specific to particular data collection / processing activities.

### What personal data we hold

The types of data we hold and process about you can include:

- Contact details, including name, address, telephone numbers and email address;
- Identifying details, including date of birth and national insurance number;
- Information relating to your benefits in the Fund, including length of service or membership and salary;
- Other information in relation to your membership of the Fund or to enable the calculation or payment of benefits, for example bank account details;
- Information about your family, dependants or personal circumstances, for example, marital status and information relevant to the distribution and allocation of benefits payable on death;
- Information about your health, for example, to assess eligibility for benefits payable on ill health, or where your health is relevant to a claim for benefits following the death of a member of the Fund; and
- Information about a criminal conviction if this has resulted in you owing money to your employer or the Fund and the employer or Fund may be reimbursed from your benefits.

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We obtain some of this personal data directly from you. We may also obtain data from your Employer (for example, salary information) and from other sources including public databases and the Advisers and service providers that we may share your personal data which are listed in the Full Privacy Notice.

### What we do with your personal data

We will use this personal data to administer the Fund and to calculate and provide you (and, if you are a Member of the Fund, your beneficiaries if you die) with benefits. We will also use this personal data for statistical and financial modelling and reference purposes (for example, when we assess how much money is needed to provide members' benefits and how that money should be invested), and to comply with our legal obligations.

From time to time we will share your personal data with third parties, including our contractors, Advisers, government bodies and dispute resolution and law enforcement agencies and insurers in order to comply with our obligations under data protection legislation, and in connection with the provision of services that help us carry out our duties, rights and discretions in relation to the Fund. These organisations are listed in the Full Privacy Notice.

We may also process your personal data to assess and, if appropriate, action a request you make to transfer your benefits out of the Fund.

In some cases recipients of your personal data may be outside the UK. If this occurs, we will make sure that additional safeguards are in place to protect your data in accordance with applicable data protection laws. Please use the contact details below if you want more information in connection with this.

### The legal basis for our use of your personal data

The legal basis for our use of your personal data will usually be that we need to process your personal data to satisfy our legal obligations as the Administering Authority of the Fund. However, where that legal basis does not apply then the legal basis for our use of your personal data will be one or more of the following:

- we need to process your personal data to carry out a task in the public interest or in the exercise of official authority in our capacity as a public body;
- we need to process your personal data for the legitimate interests of administering and managing the Fund and liabilities under it, calculating, securing and paying benefits and performing our obligations and exercising any rights, duties and discretions the Administering Authority has in relation to the Fund.; and
- because we need to process your personal data to meet our contractual obligations in relation to the Fund (for example, under an agreement that you will pay additional

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voluntary contributions to the Fund), or to take steps, at your request, before entering into a contract.

### How long we hold your data

We will only keep your personal data for as long as we need it to administer the Fund and to deal with any questions or complaints that we may receive about this, unless the law requires us to keep it for a longer period. In practice, this means that your personal data may be retained for the greater of:

- Such period as you (or any beneficiary who receives benefits after your death) are entitled to benefits from the Fund and for a period of 15 years after those benefits stop being paid. For the same reason, your personal data may also need to be retained where you have received a transfer, or refund, from the Fund in respect of your benefit entitlement; or
- 100 years from a member's date of birth; or
- 100 years from the date of birth of any beneficiary who received benefits from the Fund after the member's death.

### Your rights

You have a right to access and obtain a copy of the personal data that we hold about you and to ask us to correct your personal data if there are any errors or it is out of date or incomplete. In very limited circumstances, you may also have a right to ask us to restrict the processing of your personal data or to transfer or (in extremely limited circumstances, such as where your personal data is no longer needed for the purpose for which it is being processed) erase your personal data. You should note that we are not obliged to erase your personal data if we need to process it for the purposes of administering the Fund.

In certain circumstances you have the right to object to the processing of your personal data; for example you have the right to object to processing of your personal data which is based on the public interest or legitimate interests identified in the section above headed "**The legal basis for our use of your personal data**", or where the processing is for direct marketing purposes.

You can obtain further information about your rights from the Information Commissioner's Office at: [www.ico.org.uk](http://www.ico.org.uk) or via their telephone helpline (0303 123 1113).

If you wish to exercise any of these rights, please contact the Compliance Team below. You also have the right to lodge a complaint in relation to this Privacy Notice, the Full Privacy Notice

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or our processing activities with the Information Commissioner's Office, which you can do through the website above or their telephone helpline.

One of the reasons we collect and hold your personal data is to administer your benefits from the Fund. If you do not provide the information we request, or ask that the personal data we already hold is deleted or that the processing of the personal data be restricted, this may affect our ability to administer your benefits, including the payment of benefits from the Fund. In some cases it could mean that we are unable to put your pension into payment or have to stop your pension (if already in payment).

### Review

We may update this Privacy Notice periodically. Where we do this we will inform Members and beneficiaries of the changes and the date on which the changes take effect.

### Further Information

If you require further information about this Privacy Notice, please contact:

Amanda Crawford, Compliance Manager, Essex Pension Fund

Email – [Amanda.crawford@essex.gov.uk](mailto:Amanda.crawford@essex.gov.uk)

Jody Evans, Director for Essex Pension Fund

Email – [Jody.evans@essex.gov.uk](mailto:Jody.evans@essex.gov.uk)

Essex Pension Fund  
Seax House  
County Hall  
Chelmsford  
Essex  
CM1 1QH

### Information Governance Team (Essex County Council)

You may also contact our Information Governance Team  
[informationgovernanceteam@essex.gov.uk](mailto:informationgovernanceteam@essex.gov.uk) for information.