

Dear Member,

University of Dundee Superannuation and Life Assurance Scheme

Scheme Actuary Jonathan Seed of Xafinity Consulting Limited and your data

I am the Scheme Actuary to the University of Dundee Superannuation and Life Assurance Scheme ("the Scheme"). My main role is to advise the Scheme's Trustees on how well the Scheme is funded.

In order to be able to advise the Trustees, I may need to access your personal information.

I take looking after your personal information (known as 'data') very seriously and I'm committed to ensuring that it is only used for the specific purposes set out below and that it's secure at all times. In doing this I meet Xafinity Consulting Limited's data protection and security policies and procedures.

I am a joint Data Controller together with the Scheme Trustees. This means that we're jointly legally responsible for complying with data protection laws. Contact details of all the Data Controllers are detailed at the end of this notice.

Where do I get your information from?

Your data is provided to me by the Scheme Trustees and their appointed Scheme administrator. Some information may also be provided directly by your employer.

How will I use your data?

As noted above, certain calculations and advice must (by law) be provided by me as Scheme Actuary to the Scheme Trustees.

Your data will only be used by me in accordance with my Terms of Engagement with the Scheme Trustees and professional guidance standards. I will only ask for your personal information if it is necessary for me to undertake my services as the Scheme Actuary.

What information do I need and why?

Your information is used to:

- value the Scheme's liabilities, in order to determine the level of funding relative to the Scheme's assets and to advise the Trustees on the employer contributions that will be required in future;
- value options available to individual Scheme members including the value of your pension (e.g. on transfer to another scheme); and
- advise the Scheme Trustees on the Scheme's investments.

The information I may need about you in order to provide this includes:

- name;
- date of birth;
- sex;
- marital status;
- address;
- employment service information;
- salary and pension amounts; and
- whether a pension in payment resulted from ill health retirement. In this circumstance, I don't process data about your state of health, only that you are in receipt of such a pension, and this data will only be used if passed to me by the Scheme Trustees or Scheme administrator.

Who do I share your information with?

I'll only share your information with third parties if it's necessary for me to provide my services as the Scheme Actuary. This means that your information may be shared:

- with the Scheme Trustees;
- with Xafinity Consulting Limited, as a Data Processor for the Scheme;
- with law enforcement agencies (subject to any requests being legally made);
- with regulators as required (including HMRC, the Pensions Regulator, the Financial Conduct Authority and the Information Commissioner's Office); and
- with certain approved suppliers used by Xafinity Consulting Limited. These may include suppliers of computer services printing and mailing services, and offsite storage.

Your data is not shared with any other party and will not be transferred to anyone outside the UK.

What are your rights?

You have the right to:

- request copies of the personal data we hold about you and we will provide that within 30 calendar days. If you wish to do so you should contact me at the address below;
- erase or correct any information that is incorrect or inaccurate; and
- restrict what we do with your information until we correct it or if you believe we are using your data unlawfully.

Xafinity Consulting Limited has formal documented Information Security and Data Protection policies that set out the security measures currently implemented and maintained. These core policies are supported by additional policies covering our use of data encryption, physical security of our offices and data centres and acceptable usage of email, internet facilities and telephone. Copies of these policies are available on request.

How long do I keep the information for?

I retain your information for a number of reasons including to demonstrate that the Scheme has complied with its rules, and that Xafinity Consulting Limited is meeting its contractual obligations. This means that I keep all of your information whilst I am the appointed Scheme Actuary, even if you cease to be a member, and until any possible legal responsibilities or liabilities have ended.

Information will be kept for regulatory purposes to demonstrate the Scheme Actuary's compliance with actuarial practice and regulation and for 12 years following the end of the appointment as Scheme Actuary.

How to complain

If you're not happy with how we process your data you will have the right to complain to the Information Commissioner and we can provide details about how to do that.

Kind regards,

Jonathan Seed

Scheme Actuary