



## **PRIVACY POLICY**

On May 25th 2018 the new General Data Protection Regulation (GDPR) will come into force. Privacy policy conditions will be explained below, where you can find information in regard to the purpose of storing your personal data, what the legal basis of processing is, to whom we will provide data in case of need and how long we retain data in the system. In addition to this, you can find information on the rights you are entitled to in this respect.

The protection of your personal data in the process of collection, processing and use is of significant importance to us.

This statement describes how Seyer & Partner Family Office Services GmbH Gottfried-Keller-Gasse 2/1/3+4, 1030 Vienna ("we") process your personal data. The declaration is addressed to existing and former clients, prospects and potential future clients, as well as their respective shareholders, bodies and other employees.

### **1. PURPOSE OF DATA PROCESSING**

We process personal data for the following purpose:

- the establishment, administration and processing of the business relationship
- to strengthen the relationship with existing customers
- to establish new customer relationships or to approach prospects, including information on

current developments and the range of services we offer

- internal organisation and claims management

As far as commissioned by the client we also process data for the following reason:

- to provide advice on private and economic matters
- to carry out consultancy work for multi generation entrepreneurial families in the context of
- clarifying family strategic issues (succession, division of property) as well as to reorganise the organisation (committees, family council, advisory council, supervisory board)
- for investment advice within the scope of the authorisation of § 4 WAG 2018 including the distribution of investment funds permitted by the scope of the authorisation as well

as for each assigned task according to § 4 WAG 2018

Regarding the collection of personal data from you, the provision of such is generally voluntary. We can, however, not entirely fulfil our mission in providing the best service to you if you choose to not provide your personal information.



## **2. LEGAL BASIS OF PROCESSING**

If you are a prospective or potential future customer, we will only use your contact details for the purpose of direct mailing via electronic mail or telephone contact. This will only happen with your consent in accordance with Art. 6 Abs. 1 lit. a of the General Data Protection Regulation (GDPR).

If you are an existing customer we will process your personal data as this is necessary in order to

fulfil the contract concluded with you (Art. 6 Abs. 1 lit. b GDPR).

In addition to this, we process your personal data on the basis of our predominantly legitimate interest.

This is in order to achieve the purposes mentioned under part 1 (Article 6 (1) GDPR, Article 9 (2) (g) GDPR).

## **3. PERSONAL DATA TRANSFER**

If it is absolutely necessary, as stated in part 1, we will have to forward your personal data to the following recipients:

- investment firms which manage clients' money and provide services on a permanent or case by case basis
- administrative authorities, courts and public bodies
- chartered accountants for the purpose of an extended audit according to WAG 2018
- insurances on the occasion of the conclusion of an insurance contract on the performance

or occurrence of an insured event (e.g. liability insurance)

- cooperation partners, tax and legal advisers who are acting on our behalf or on behalf of the client
- other recipients defined by the customer (e.g. committees)
- banks on behalf of the customer

Some of the recipients mentioned above may be located outside of Austria or may process your personal information outside of Austria. The level of data protection in other countries may not be equal to the one in Austria.



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5. RIGHTS IN CONNECTION WITH PERSONAL DATA

Amongst other things you are entitled to:

- I. check if and what personal data we process as well as to obtain copies of such
- II. demand the correction, addition or deletion of your personal data, insofar as this is incorrect or not processed in accordance with the law
- III. restrict the processing of your personal data
- IV. object the processing of your personal data in certain circumstances.
- V. revoke the prior consent for processing whereby revocation does not affect the legality of the processing prior to the revocation
- VI. demand data portability as far as you are an existing customer
- VII. know the identity of third parties to whom your personal information is being transmitted to
- VIII. file a complaint with the Data Protection Authority

6. OUR CONTACT DETAILS

If you should have further questions on behalf of this explanation, please contact:

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Data protection officer: ms@seyer-partner.com  
Gottfried Keller Gasse 2/3+4, 1030 Vienna  
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