

# Privacy Notice for NatWest Plan Ahead

## How we use your information

Information you upload to NatWest Plan Ahead will be used to support your end of life planning and personalize your checklist and will be shared with your nominated key person(s). Your contact information will be kept up to date with our main Bank systems.

## Why would you share your information with NatWest Plan Ahead

Sharing your information with NatWest Plan Ahead enables you to:

- Retain the relevant information you wish to upload in one central location
- Share this information with key person(s) such as family members or executors/solicitors
- Identify areas where you may need further information

## Who we share your info with

We share your information with:

- Key persons nominated and authorised by yourself
- Other companies in our group
- Third parties providing services to us, such as market analysis and benchmarking and our sub-contractors acting on our behalf such as the technical solution provider for Plan Ahead.

## Marketing Preferences

We would like to support with your NatWest Plan Ahead planning options and offer 3rd party products or services which may be of benefit to you.

You can opt out of these offers at any time using the Unsubscribe option from the emails we send you or from the Plan Ahead website, Privacy Policy section in the Main Menu.

## Cookie Policy for NatWest Plan Ahead

We use a variety of different technologies on Plan Ahead. These technologies include (but are not limited to) cookies, scripts, fonts and images. Some of these are considered as necessary for us to deliver the website to you.

Others are used to enhance our understanding of how you use our website, or to assist in our marketing activities.

The purpose of this notice is to explain how we use such technologies and the third parties we work with, and to provide you with clear information about their purpose. It also explains how you can control your online preferences.

New regulations will change the way in which the use of cookies is governed in the future and we'll update this notice once those changes come into effect. We may also revise this notice from time to time. If we make any material changes to the way we use these technologies, we will prominently publish the changes on our website.

### **Cookies – what are they?**

A “cookie” is a small text file that’s stored on your computer, smartphone, tablet, or other device when you visit a website. They contain specific information relating to your use of Plan Ahead, such as login credentials; your preference settings or tracking identifiers.

Cookies are set by our web server, your browser and the web servers of the third parties whose cookies we deploy on our website. They can be read, updated or deleted by those same servers each time you visit our web site, depending on the type of cookie.

Some cookies are deleted when you close your browser. These are known as session cookies. Other cookies (such as tracking cookies or authentication cookies) remain on your device until they expire, or you delete them from your browser. These are known as persistent cookies and enable us to remember things about you as a returning visitor.

Plan Ahead uses persistent cookies.

Some cookies can impact your fundamental rights to privacy and the protection of your data. As such, we require your consent before they can be accessed or stored on your device. For this reason, we limit our use of cookies as explained below.

### **Cookies – how we use them**

We use cookies and other similar technologies to:

- Provide services that you request and to provide a secure online environment.
- Deliver marketing and to manage our marketing relationships with our third-party marketing partners.
- Give you a better online experience and track website performance.
- Help us make our website more relevant to you.

Here we explain a bit more about each of these types and how you can control their use.

### Strictly Necessary Cookies

These are cookies that are essential for the safe operation of Plan Ahead and for us to provide a service you have requested.

Without these cookies we are unable to provide some services that you might request. This category of cookies cannot be disabled.

These cookies are used to:

- Enable you to log into the secure areas of our website.
- Enable us to manage the website traffic efficiently.
- Record some of your application preferences and progress.
- Record your preference regarding our use of cookies on your device.
- Keep our website secure and protect against online fraud.

### Measurement Cookies

These cookies are set by third-party analytics provider and allow us to record certain information about you, such as the pages you visit on Plan Ahead; how many times you visit our website; and links you might click on.

We use this type of cookie to understand and analyse how visitors use Plan Ahead and look for ways to improve them. For example, a cookie might tell us that lots of people give up on an application process at a particular step – so we can try to make that step easier to complete.

The third-party analytics provider may also collect other information about you such as your IP address, your geographical location, what type of device you are using and information about the device. This information can be used to create a unique fingerprint to help further identify you on other webpages you might visit and can be used to create a profile of your online activities and interests.

For this purpose, Plan Ahead uses Google Analytics which is a web analysis service provided by Google LLC (“Google”). Google utilizes the Data collected to track and examine the use of this website, to prepare reports on its activities and share them with us as well as other Google services. Google may use the Data collected to contextualize and personalize the ads of its own advertising network.

Place of processing: United States – [Privacy Policy](#). Privacy Shield participant.

## How to control and delete cookies

Preference Centre - If you want to restrict or block the cookies on Plan Ahead, you can do this at any time through your Cookies Preference Centre by clicking here. The tool will record when you have consented to our use of cookies and will ask for consent again periodically to ensure users stay up to date with changes to our cookie and privacy policies. Essential cookies cannot be disabled. The tool specifically controls the cookies set by using our website and it cannot be used to block cookies on third-party websites linked from our website.

Browser Settings – Cookies used on Plan Ahead can also be enabled or disabled through your browser settings. The ‘help’ function within your browser should tell you how, or you can find out by visiting: <http://www.allaboutcookies.org/manage-cookies/clear-cookies-installed.html>, or search the internet for other independent information on how to delete cookies. You can set your browser to delete all past cookies and to disallow third-party cookies.

To find out more about cookies, including how to see what cookies have been set and how to manage and delete them, visit <http://www.youronlinechoices.com/uk/your-ad-choices>. Alternatively, you can search the internet for other independent information on cookies.

If you delete cookies relating to this website, we will not remember things about you, and you will be treated as a first-time visitor the next time you visit the site.

## What can happen?

If you no longer wish to use this service you can cancel your contract at any time. Your information will then be deleted within 30 days time.

If you want more details about how we use your information or your rights, please read our full [Privacy Notice](#).

Further Information: Please visit the [Terms and Conditions](#) section at [www.planahead.natwest.com](http://www.planahead.natwest.com)