Executive Pensions – Corporate Client – Data Map

Type of **Personal Data**	Who is the subject of that data?	Reason for Barnett Waddingham **processing** the data
☒ Name	☒ Active members ☒ Deferred members ☒ Pensioners (including those in receipt of dependants' or spouses' pensions) ☒ Former members/pensioners with no further entitlement under the scheme ☒ Non-members who have received benefits from the scheme and have no further entitlement ☒ Non-members who BW has enquiries from, or on behalf of, as potentially previous members of the scheme ☒ Active, deferred or pensioner member of any other registered pension scheme ☒ Active, deferred or pensioner member of any unapproved pension arrangement	☒ Issuing communications and information to data subject. ☒ Calculating data subjects' pensions allowance limits and tax charges. ☒ Estimating data subjects' benefits at selected retirement ages ☒ Establishing the identity of the data subject and ensuring compliance with duties relating to anti-money laundering and terrorist financing
☒ Date of birth	☒ Active members ☒ Deferred members ☒ Pensioners (including those in receipt of dependants' or spouses' pensions) ☒ Former members/pensioners with no further entitlement under the scheme ☒ Non-members who have received benefits from the scheme and have no further entitlement ☒ Non-members who BW has enquiries from, or on behalf of, as potentially previous members of the scheme ☒ Active, deferred or pensioner member of any other registered pension scheme ☒ Active, deferred or pensioner member of any unapproved pension arrangement	☒ Issuing communications and information to data subject. ☒ Calculating data subjects' pensions allowance limits and tax charges. ☒ Estimating data subjects' benefits at selected retirement ages ☒ Establishing the identity of the data subject and ensuring compliance with duties relating to anti-money laundering and terrorist financing

☒ Gender	☒ Active members ☒ Deferred members ☒ Pensioners (including those in receipt of dependants' or spouses' pensions) ☒ Former members/pensioners with no further entitlement under the scheme ☒ Non-members who have received benefits from the scheme and have no further entitlement ☒ Non-members who BW has enquiries from, or on behalf of, as potentially previous members of the scheme ☒ Active, deferred or pensioner member of any other registered pension scheme ☒ Active, deferred or pensioner member of any unapproved pension arrangement	☒ Issuing communications and information to data subject. ☒ Calculating data subjects' pensions allowance limits and tax charges. ☒ Estimating data subjects' benefits at selected retirement ages ☒ Establishing the identity of the data subject and ensuring compliance with duties relating to anti-money laundering and terrorist financing
☒ Marital Status	☒ Active members ☒ Deferred members ☒ Pensioners (including those in receipt of dependants' or spouses' pensions) ☒ Former members/pensioners with no further entitlement under the scheme ☒ Non-members who have received benefits from the scheme and have no further entitlement ☒ Non-members who BW has enquiries from, or on behalf of, as potentially previous members of the scheme ☒ Active, deferred or pensioner member of any other registered pension scheme ☒ Active, deferred or pensioner member of any unapproved pension arrangement	☒ Issuing communications and information to data subject. ☒ Calculating data subjects' pensions allowance limits and tax charges. ☒ Estimating data subjects' benefits at selected retirement ages ☒ Establishing the identity of the data subject and ensuring compliance with duties relating to anti-money laundering and terrorist financing
☒ Addresses	☒ Active members ☒ Deferred members ☒ Pensioners (including those in receipt of dependants' or spouses' pensions) ☒ Former members/pensioners with no further entitlement under the scheme ☒ Non-members who have received benefits from the scheme and have no further entitlement ☒ Non-members who BW has enquiries from, or on behalf of, as potentially previous members of the scheme ☒ Active, deferred or pensioner member of any other registered pension scheme	☒ Issuing communications and information to data subject. ☒ Calculating data subjects' pensions allowance limits and tax charges. ☒ Estimating data subjects' benefits at selected retirement ages ☒ Establishing the identity of the data subject and ensuring compliance with duties relating to anti-money laundering and terrorist financing

	☒ Active, deferred or pensioner member of any unapproved pension arrangement	
☒ Other contact details (e.g. e-mail and telephone number)	☒ Active members ☒ Deferred members ☒ Pensioners (including those in receipt of dependants' or spouses' pensions) ☒ Former members/pensioners with no further entitlement under the scheme ☒ Non-members who have received benefits from the scheme and have no further entitlement ☒ Non-members who BW has enquiries from, or on behalf of, as potentially previous members of the scheme ☒ Active, deferred or pensioner member of any other registered pension scheme ☒ Active, deferred or pensioner member of any unapproved pension arrangement	☒ Issuing communications and information to data subject. ☒ Calculating data subjects' pensions allowance limits and tax charges. ☒ Estimating data subjects' benefits at selected retirement ages ☒ Establishing the identity of the data subject and ensuring compliance with duties relating to anti-money laundering and terrorist financing
☒ National Insurance number	☒ Active members ☒ Deferred members ☒ Pensioners (including those in receipt of dependants' or spouses' pensions) ☒ Former members/pensioners with no further entitlement under the scheme ☒ Non-members who have received benefits from the scheme and have no further entitlement ☒ Non-members who BW has enquiries from, or on behalf of, as potentially previous members of the scheme ☒ Active, deferred or pensioner member of any other registered pension scheme ☒ Active, deferred or pensioner member of any unapproved pension arrangement	☒ Issuing communications and information to data subject. ☒ Calculating data subjects' pensions allowance limits and tax charges. ☒ Estimating data subjects' benefits at selected retirement ages ☒ Establishing the identity of the data subject and ensuring compliance with duties relating to anti-money laundering and terrorist financing

☒ Membership reference number	☒ Active members ☒ Deferred members ☒ Pensioners (including those in receipt of dependants' or spouses' pensions) ☒ Former members/pensioners with no further entitlement under the scheme ☒ Non-members who have received benefits from the scheme and have no further entitlement ☒ Non-members who BW has enquiries from, or on behalf of, as potentially previous members of the scheme ☒ Active, deferred or pensioner member of any other registered pension scheme ☒ Active, deferred or pensioner member of any unapproved pension arrangement	☒ Issuing communications and information to data subject. ☒ Calculating data subjects' pensions allowance limits and tax charges. ☒ Estimating data subjects' benefits at selected retirement ages ☒ Establishing the identity of the data subject and ensuring compliance with duties relating to anti-money laundering and terrorist financing
☒ Pensionable service information	☒ Active members ☒ Deferred members ☒ Pensioners (including those in receipt of dependants' or spouses' pensions) ☒ Former members/pensioners with no further entitlement under the scheme ☒ Non-members who have received benefits from the scheme and have no further entitlement ☒ Non-members who BW has enquiries from, or on behalf of, as potentially previous members of the scheme ☒ Active, deferred or pensioner member of any other registered pension scheme ☒ Active, deferred or pensioner member of any unapproved pension arrangement	☒ Issuing communications and information to data subject. ☒ Calculating data subjects' pensions allowance limits and tax charges. ☒ Estimating data subjects' benefits at selected retirement ages ☒ Establishing the identity of the data subject and ensuring compliance with duties relating to anti-money laundering and terrorist financing
☒ Employment history, including employment dates	☒ Active members ☒ Deferred members ☒ Pensioners (including those in receipt of dependants' or spouses' pensions) ☒ Former members/pensioners with no further entitlement under the scheme ☒ Non-members who have received benefits from the scheme and have no further entitlement ☒ Non-members who BW has enquiries from, or on behalf of, as potentially previous members of the scheme ☒ Active, deferred or pensioner member of any other registered pension scheme	☒ Issuing communications and information to data subject. ☒ Calculating data subjects' pensions allowance limits and tax charges. ☒ Estimating data subjects' benefits at selected retirement ages ☒ Establishing the identity of the data subject and ensuring compliance with duties relating to anti-money laundering and terrorist financing

	☒ Active, deferred or pensioner member of any unapproved pension arrangement	
☒ Salary, Bonus and other taxable earnings data	☒ Active members ☒ Deferred members ☒ Pensioners (including those in receipt of dependants' or spouses' pensions) ☒ Former members/pensioners with no further entitlement under the scheme ☒ Non-members who have received benefits from the scheme and have no further entitlement ☒ Non-members who BW has enquiries from, or on behalf of, as potentially previous members of the scheme ☒ Active, deferred or pensioner member of any other registered pension scheme ☒ Active, deferred or pensioner member of any unapproved pension arrangement	☒ Issuing communications and information to data subject. ☒ Calculating data subjects' pensions allowance limits and tax charges. ☒ Estimating data subjects' benefits at selected retirement ages ☐ Establishing the identity of the data subject and ensuring compliance with duties relating to anti-money laundering and terrorist financing
☒ Contribution data (DB & DC)	☒ Active members ☒ Deferred members ☒ Pensioners (including those in receipt of dependants' or spouses' pensions) ☒ Former members/pensioners with no further entitlement under the scheme ☒ Non-members who have received benefits from the scheme and have no further entitlement ☒ Non-members who BW has enquiries from, or on behalf of, as potentially previous members of the scheme ☒ Active, deferred or pensioner member of any other registered pension scheme ☒ Active, deferred or pensioner member of any unapproved pension arrangement	☒ Issuing communications and information to data subject. ☒ Calculating data subjects' pensions allowance limits and tax charges. ☒ Estimating data subjects' benefits at selected retirement ages ☐ Establishing the identity of the data subject and ensuring compliance with duties relating to anti-money laundering and terrorist financing

☒ Benefit and investment data (DB & DC)	☒ Active members ☒ Deferred members ☒ Pensioners (including those in receipt of dependants' or spouses' pensions) ☒ Former members/pensioners with no further entitlement under the scheme ☒ Non-members who have received benefits from the scheme and have no further entitlement ☒ Non-members who BW has enquiries from, or on behalf of, as potentially previous members of the scheme ☒ Active, deferred or pensioner member of any other registered pension scheme ☒ Active, deferred or pensioner member of any unapproved pension arrangement	☒ Issuing communications and information to data subject. ☒ Calculating data subjects' pensions allowance limits and tax charges. ☒ Estimating data subjects' benefits at selected retirement ages ☐ Establishing the identity of the data subject and ensuring compliance with duties relating to anti-money laundering and terrorist financing
☒ Contracting out record	☒ Active members ☒ Deferred members ☒ Pensioners (including those in receipt of dependants' or spouses' pensions) ☒ Former members/pensioners with no further entitlement under the scheme ☒ Non-members who have received benefits from the scheme and have no further entitlement ☒ Non-members who BW has enquiries from, or on behalf of, as potentially previous members of the scheme ☒ Active, deferred or pensioner member of any other registered pension scheme ☒ Active, deferred or pensioner member of any unapproved pension arrangement	☒ Issuing communications and information to data subject. ☒ Calculating data subjects' pensions allowance limits and tax charges. ☒ Estimating data subjects' benefits at selected retirement ages ☐ Establishing the identity of the data subject and ensuring compliance with duties relating to anti-money laundering and terrorist financing
Tax and National Insurance information This includes the following data: ☒ National Insurance number ☒ PAYE details ☒ Lifetime Allowance Protections ☒ Unique Tax Reference (UTR) Number	☒ Active members ☒ Deferred members ☒ Pensioners (including those in receipt of dependants' or spouses' pensions) ☒ Former members/pensioners with no further entitlement under the scheme ☒ Non-members who have received benefits from the scheme and have no further entitlement ☒ Non-members who BW has enquiries from, or on behalf of, as potentially previous members of the scheme ☒ Active, deferred or pensioner member of any other registered pension scheme	☒ Issuing communications and information to data subject. ☒ Calculating data subjects' pensions allowance limits and tax charges. ☒ Estimating data subjects' benefits at selected retirement ages ☒ Establishing the identity of the data subject and ensuring compliance with duties relating to anti-money laundering and terrorist financing

	☒ Active, deferred or pensioner member of any unapproved pension arrangement	
☒ Passport or identification card details (including number, country of issue and expiry date) If the individual does not have a passport or identification card, details of any equivalent form of identification e.g. driving licence	☒ Active members ☒ Deferred members ☒ Pensioners (including those in receipt of dependants' or spouses' pensions) ☒ Former members/pensioners with no further entitlement under the scheme ☒ Non-members who have received benefits from the scheme and have no further entitlement ☒ Non-members who BW has enquiries from, or on behalf of, as potentially previous members of the scheme ☒ Active, deferred or pensioner member of any other registered pension scheme ☒ Active, deferred or pensioner member of any unapproved pension arrangement	☐ Issuing communications and information to data subject. ☐ Calculating data subjects' pensions allowance limits and tax charges. ☐ Estimating data subjects' benefits at selected retirement ages ☒ Establishing the identity of the data subject and ensuring compliance with duties relating to anti-money laundering and terrorist financing
Special categories of personal data ☒ Health data ☒ Data concerning a person's sex life or sexual orientation	☒ Active members ☒ Deferred members ☒ Pensioners (including those in receipt of dependants' or spouses' pensions) ☒ Former members/pensioners with no further entitlement under the scheme ☒ Non-members who have received benefits from the scheme and have no further entitlement ☒ Non-members who BW has enquiries from, or on behalf of, as potentially previous members of the scheme ☒ Active, deferred or pensioner member of any other registered pension scheme ☒ Active, deferred or pensioner member of any unapproved pension arrangement	☒ Issuing communications and information to data subject. ☒ Calculating data subjects' pensions allowance limits and tax charges. ☒ Estimating data subjects' benefits at selected retirement ages ☐ Establishing the identity of the data subject and ensuring compliance with duties relating to anti-money laundering and terrorist financing