

Executive Pension – Individual Client – Data Map

Type of Personal Data	Who is the subject of that data?	Reason for Barnett Waddingham processing the data
☒ Name ☒ Date of birth ☒ Gender ☒ Marital Status ☒ Addresses ☒ Other contact details (e.g. e-mail and telephone number) ☒ National Insurance number ☒ Membership reference number ☒ Pensionable service information ☒ Employment history, including employment dates ☒ Salary, bonus and other taxable earnings data ☒ Contribution data (DB & DC) ☒ Benefit and investment data (DB & DC) ☒ Contracting out record ☒ National Insurance number ☒ PAYE details ☒ Lifetime Allowance Protections ☒ Unique Tax Reference (UTR) Number ☒ 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 Special categories of personal data ☒ Health data ☒ Data concerning a person's sex life or sexual orientation	☒ Individual client	☒ Issuing communications and information to data subject. ☒ Calculating data subjects' pensions allowance limits and tax charges. ☒ Estimating data subjects' benefits at selected retirement ages ☒ Guidance on actions required ☒ ☒ Establishing the identity of the data subject and ensuring compliance with duties relating to anti-money laundering and terrorist financing