Adviserly Limited Privacy Notice

Last updated: 27 October 2026

Adviserly Limited values your privacy and respects the rights you have in relation to your personal data. This Privacy Notice (Notice) lets you know how we use your personal data and provides details of your rights under data protection law.

It is important that you read this Notice carefully together with any other privacy notice(s) we may provide so that you are fully aware of how and why we are using your personal data. This notice supplements all other privacy notices provided by us and is not intended to override them.

When we collect and use your personal data, we are subject to the UK General Data Protection Regulation (UK GDPR). We are also subject to the EU General Data Protection Regulation (EU GDPR) in relation to individuals in the European Economic Area (EEA). The main body of this Notice applies to everyone. If you are in a jurisdiction covered by a Schedule at the end of this Notice, the Schedule also applies to you and sets out any additional information and rights.

1. Who is the controller of your personal data?

1.1 Adviserly Limited is a UK-based professional membership and collaboration organisation supporting boutique and independent law firms. We facilitate networking, referrals, introductions, knowledge sharing and collaboration between law firms and legal professionals and third parties through our membership community, events and digital platforms.

1.2 Adviserly Limited (registered number 17062693) is the controller for your personal data (referred to as “Adviserly”, "we", "us" or "our" in this Notice). This means we decide how and why to use your personal data. Adviserly is registered with the Information Commissioner's Office (ICO) with registration number ZC120495.

1.3 Adviserly is not a law firm or accounting firm and is not regulated by the Solicitors Regulation Authority. In the referral process, we make introductions only. When introducing clients and professionals to each other, we do not verify the parties’ identities, which is the responsibility of each party.

1.4 You can find our full contact details in Section 18 (Contact details).

2. Who does this Notice relate to?

2.1 This Notice tells you about how we collect and use your personal data when:

2.1.1 you are a website visitor;

2.1.2 you work at a prospective member firm, or you are someone who has asked to join our network of boutique law firms;

2.1.3 you work at a member law or tax advisory firm;

2.1.4 you are a third-party service provider who provides services to law firms who we introduce to our firms, or where you are a panellist or speaker at our events;

2.1.5 you are the guest of one of our Members or Friends at an event we organise;

2.1.6 you request an introduction to an adviser; and

2.1.7 you register for or attend one of our events.

2.2 Our services and our website are not intended for children, and we do not knowingly collect personal data relating to children.

2.3 This Privacy Notice does not apply to Adviserly's employees, job applicants or recruitment activities.

3. What happens if this Notice is updated or your personal data changes?

3.1 This Notice was last updated on the date at the beginning of the Notice, and any historic versions can be obtained by contacting us at info@adviserly.io. We will publish any changes to this Notice on our website. If we make material changes that significantly affect how we use your personal data, we will also notify you via email.. It is important that the personal data we hold about you is accurate and up to date. Please let us know if your personal data changes during your relationship with us.

4. Definitions

4.1 Please find below some key definitions to help you to understand this Notice:

Word	Meaning
Personal data	information relating to an identified or identifiable living individual
Special categories of personal data	personal data revealing racial or ethnic origin, political opinions, religious or philosophical beliefs, trade union membership, genetic data, biometric data used to uniquely identify an individual, data concerning health or data concerning a natural person's sex life or sexual orientation
Criminal offence data	personal data relating to criminal convictions and offences or related security measures. This covers information about offenders or suspected offenders in the context of criminal activity,

	allegations, investigations and proceedings and information relating to the absence of convictions
Member	A firm (including law firms, advisory firms and consultancies) which is in the paying membership tier of Adviserly membership
Friend	A firm (including law firms, advisory firms and consultancies) which is in the non-paying membership tier of Adviserly membership

4.2 We do not intentionally collect any special categories of personal data about you, your team, your clients or any third parties, as we do not need this information. Please do not send it to us. If we receive it, we will delete it promptly.

5. What personal data do we collect?

5.1 We collect, use, store and transfer different kinds of personal data about you which we have grouped together in the table below. The terms below are mainly used in Section 8 (What do we use your personal data for and why?) to explain why we use the personal data in the way we do:

Description	Personal data
Communication data	the channel and method by which we communicate with you and the contents of communications with you including emails, messages, call notes, meeting notes, introduction requests, feedback, survey responses and questionnaire responses.
Contact data	business email address, telephone and WhatsApp number, business address, and professional or social media profile details.
Event data	event registration details, attendance information, attendee lists, firm names, individual names where relevant, speaker or panellist information, photographs, videos, survey responses, information used to facilitate event introductions, and information included in brochures such as attendee names and photographs.
Financial data	bank details, billing information, payment card details and other payment information.

Identity data	name, title, job title, firm or organisation, username or similar identifier, photograph and video image.
Marketing data	your communication preferences, your interactions with our communications, and publicly available professional information used to identify people and firms who may be interested in what we do.
Profile and membership data	your or your firm's membership status and profile, areas of legal focus, sector or client focus, interests and preferences, participation in pods, circles, WhatsApp groups, calls and dinners, introductions and referrals made or requested, and login details where applicable.
Referral value data	your responses to our regular referral-value survey for the purpose of measuring referral activity between members and producing aggregate and anonymised reports.
Sponsor and preferred provider data	contact and organisation details, services offered, recommendations and introductions, commission information, and invoicing records.
Technical and usage data	IP address, login data, browser type and version, time zone and location setting, operating system, device information, and how you use our website and platforms.

6. What happens if you don't provide us with your personal data?

6.1 Where we need to collect personal data because:

6.1.1 we are complying with a legal or regulatory obligation including where we need to keep financial, transaction, tax or accounting records relating to payments made to Adviserly;

6.1.2 we need it under the terms of a contract we have with you; or

6.1.3 the information is necessary to enter into a contract with you.

6.2 and you fail to provide that personal data when requested, we may not be able to perform the contract we have or are trying to enter into with you. In this case, we may have to decline to provide or administer membership, arrange or facilitate introductions or referrals, register you for or allow you to participate in events, process payments, manage financial or tax records, provide access to our platforms or community activities, or otherwise provide the relevant service or opportunity. We will notify you if this is the case at the time.

7. How do we collect personal data about you?

7.1 We collect personal data from and about you using the following methods:

Collection method	Description
Direct interactions	When you contact us, enquire about or join Adviserly, take part in pods, circles, calls, dinners and events, request or receive an introduction, complete a form, questionnaire or survey, make a payment, or upload content to our website or platforms. Member firms may also give us details of the lawyers who will take part in our community.
Automated technologies or interactions	As you interact with our website, digital platforms, emails and IT systems, we may automatically collect technical data and usage data about your equipment, browsing actions, patterns and use of our website, platforms and services. We collect this information through server logs and similar technologies. Cookies and similar technologies are outside the scope of this Notice and are addressed in our separate Cookie Policy.
Third parties	We receive personal data about you from the third parties listed below: a) Luma: where you register for our events and we receive event registration and attendance information, including email addresses and related event administration data; b) Typeform: where you complete post-event surveys, questionnaires or forms; c) Stripe, Inc. and GoCardless Ltd: where you make payments or where payment, bank, billing, card or transaction information is processed in connection with our services; d) Other members, lawyers, firms, sponsors and preferred providers who recommend

	you, introduce you or give us your contact details; e) Other third parties who give us your personal data in connection with our services.
Via our IT systems	We collect and generate personal data through our internal and external IT systems and platforms (including our website and forms) used to operate our business, membership community, events, communications, referrals, introductions and digital services.
Publicly available sources	We receive personal data about you from the public sources set out below: a) law firm websites; b) professional and business websites; c) online professional profiles; d) search engines; e) other publicly available sources of a similar kind.

8. What do we use your personal data for and why?

8.1 We will only use your personal data where the law allows us to. Most commonly, we will use your personal data in the following circumstances:

8.1.1 to comply with a legal or regulatory obligation for example where we need to keep tax and accounting records, respond to a request from a regulator, comply with applicable data protection law, or deal with lawful requests from HM Revenue & Customs, courts, tribunals, public authorities or law enforcement bodies;

8.1.2 where it is in our legitimate interest or that of a third party such as running and developing our network, facilitating referrals and introductions, organising events, promoting our work, and keeping our systems secure. We will always make sure we consider and balance any potential impact on you, both positive and negative, and your rights and freedoms before we process your personal data for our or a third party's legitimate interest;

8.1.3 performance of a contract to which you are a party or to take steps at your request before entering into such a contract for example, where we provide membership services;

8.1.4 generally, we do not rely on consent as a legal basis for processing your personal data. We may send newsletters and other direct marketing by email to users at Friends and Members. Where the law requires your consent, we will only send these if you have given it. You have the right to withdraw consent to marketing at any time by contacting us at info@adviserly.io or by following the opt-out links on any marketing communications sent to you; and/or

8.1.5 to establish, exercise and/or defend any legal claims that may be brought by or against us.

8.2 The table below explains the ways in which we use your personal data and the legal basis which is used.

Individual	Purpose for processing	Personal data used	Legal basis relied on
User on behalf of a Member or Friend firm	To register you or your firm as a member of Adviserly and administer access to our membership community and platform	Identity data, Contact data, Profile and membership data, Communication data, Technical and usage data	Performance of a contract or taking steps at your request to enter into a contract; Legitimate interests in running and developing our network
User on behalf of a Member or Friend firm	Organising pods (including monthly Teams calls, notes and peer support), circles, WhatsApp groups and dinners. Note: pod calls are not recorded, and your phone number may be visible to other members of a WhatsApp group	Identity data, Contact data, Profile and membership data, Communication data, Event data	Performance of a contract; Legitimate interests in developing our professional network and collaboration

Individual	Purpose for processing	Personal data used	Legal basis relied on
User on behalf of a Member or Friend firm, Speaker/Panellist	Running legal tech calls and calls for our other Circles from time to time, which may be partly under Chatham House rules (not recorded) and partly recorded and transcribed to (in the case of our legal tech calls) update an anonymised report on how boutique law firms use AI	Identity data, Contact data, Communication data, Event data	Legitimate interests in producing anonymised insights and supporting member learning
Speaker/Panellist	Naming panellists in our materials where they want the profile	Identity data, Contact data, Profile and membership data, Event data	Consent
User on behalf of a Member or Friend firm, User on behalf of a Prospective Member or Friend firm, Business Contact	Taking call notes, including with Pipedrive's AI notetaker (Nova)	Identity data, Contact data, Communication data, Profile and membership data	Legitimate interests in keeping accurate records and following up with prospective members where applicable
User on behalf of a Member or Friend firm, User on behalf of a Prospective Member or Friend firm, Business Contact or Website Visitor	Making introductions and referrals, including to other advisers, consultants and technology providers at your request	Identity data, Contact data, Communication data, Profile and membership data	Performance of a contract with you or your firm where the introduction forms part of the services provided; Legitimate interests in building and operating our professional network

Individual	Purpose for processing	Personal data used	Legal basis relied on
Preferred Providers, Sponsors, User on behalf of a Member or Friend firm	Managing preferred providers and sponsors, including commission arrangements and sponsorship of events	Identity data, Contact data, Communication data, Financial data	Performance of a contract; Legitimate interests in running a transparent commercial model
Event attendees	Registering you for events through Luma, administering attendance, and sending post-event surveys through Typeform	Identity data, Contact data, Event data, Communication data	Legitimate interests in administering events and improving our services
Event attendees	Preparing and circulating an attendee brochure (names and photographs) before events so that attendees can connect	Identity data, Event data	Legitimate interests in facilitating networking at events
Event attendees	Telling sponsors which firms are attending. We do not name individuals unless you are taking part in a session with that sponsor.	Event data	Legitimate interests in supporting event sponsorship
Event attendees, speakers	Taking photographs and videos at events and using them in our marketing, mainly on our website	Identity data, Event data	Legitimate interests in promoting our business and community

Individual	Purpose for processing	Personal data used	Legal basis relied on
User on behalf of a Member or Friend firm, User on behalf of a prospective Member or Friend firm, business contacts	Sending network updates, newsletters and marketing, and carrying out outreach	Identity data, Contact data, Marketing data	Legitimate interests in growing and informing our network; Consent
Website visitors	Operating our website, handling forms, sign-ups and comments (including spam detection), keeping our systems secure and understanding website use	Identity data, Contact data, Communication data, Technical and usage data	Legitimate interests in operating and protecting our website and services
User on behalf of a Member or Friend firm, sponsors, preferred providers	Processing payments and keeping financial and tax records	Identity data, Contact data, Financial data	Performance of a contract; Legal obligation
Users on behalf of a Member or Friend firm	Running our regular referral-value survey to measure referral activity and produce aggregate and anonymised reports	Identity data, Contact data, Referral value data	Legitimate interests in understanding the value of our network.
All	Complying with the law, responding to regulators and handling legal claims	All relevant categories	Legal obligation; Legitimate interests; Legal claims

8.3 We will only use your personal data for the purposes for which we collected it, unless we consider that we need to use it for another reason and that reason is compatible with the original purpose.

If you wish to obtain an explanation as to how the processing for the new purpose is compatible with the original purpose, please contact us at info@adviserly.io.

8.4 If we need to use your personal data for an unrelated purpose, we will notify you and we will explain the legal basis which allows us to do so.

9. Our use of Artificial Intelligence tools

9.1 We use AI tools to help run our network. These include:

9.1.1 Claude (Anthropic): to suggest introductions between Members and event attendees, to draft referral strategy reports from questionnaire responses and firm website information, to draft emails, to translate profiles, and to power our internal firm-finder tool, which uses publicly available website information and is connected to our CRM, together with other drafting, research and analysis tasks in relation to our communications and records; and

9.1.2 Nova (Pipedrive's AI notetaker): to produce notes and transcripts of calls, including member calls.

9.2 These tools may process names, firm details, professional information and call content. Our staff review AI outputs before we act on them or send them to you. We use accounts and settings under which your information is not used to train the providers' models.

10. Automated Decision Making

10.1 We do not currently make decisions about you based solely on automated processing, including profiling, that have legal effects on you or similarly significantly affect you. Unless stated otherwise, our use of AI tools is always subject to human review.

10.2 If we introduce automated decision-making in the future, we will update this Notice before the relevant processing begins and we will provide you with an updated copy of the Notice. We will explain the logic involved, its significance and likely consequences for you, and how you can obtain human intervention, give your view and contest the decision.

11. How do we use your personal data for marketing and how can you opt out?

11.1 We send newsletters, network updates, event information and marketing to Members and Friends, together with others who have asked for them, or where we have a legitimate interest in doing so and the law allows.

11.2 We will get your express opt-in consent before we share your personal data with any third party for marketing purposes.

11.3 You can ask us to stop sending you marketing messages by contacting us at info@adviserly.io at any time or clicking unsubscribe on the bottom of our newsletters.

11.4 Where you opt out of receiving these marketing messages, this will not apply to personal data provided to us as a result of a service purchase, warranty registration, service experience or other transactions.

12. What are your rights in relation to your personal data?

12.1 You have a number of rights in relation to how we use your personal data; these are set out below in more detail. Some jurisdictions give additional rights, which are set out in the relevant Schedule.

Right	Description
Access	The right to be provided with a copy of your personal data.
Rectification	The right to have any incomplete or inaccurate personal data corrected.
Erasure (also known as right to be forgotten)	The right to require us to delete your personal data in certain situations.
Objection	The right to object: - at any time to your personal data being processed for direct marketing (including profiling). - in certain other situations to our continued processing of your personal data, e.g. processing carried out for the purpose of our legitimate interests (or those of a third party) or a recognised legitimate interest unless there are compelling legitimate grounds for the processing to continue or the processing is required for the establishment, exercise or defence of legal claims.
Restriction	The right to ask us to suspend the processing of your personal data in the following scenarios: (a) where you want us to establish the accuracy of the personal data; (b) where our use of the personal data is unlawful but you do not want us to erase it; (c) where you need us to hold the personal data even if we no longer require it as you need it to establish, exercise or defend legal claims; or (d) where you have objected to our use of your personal data but we need to verify whether we have overriding legitimate grounds to use it.
Portability	The right, in certain situations, to request transfer of your personal data to you or to a third party. We will provide your personal data (to you, or a third party you have chosen) in a structured, commonly used, machine-readable format.

The right to withdraw consent	If we are relying on consent to process your personal data, you can withdraw your consent at any time, however, this will not affect the lawfulness of any processing carried out before you withdraw your consent.
Automated decision-making rights	Where significant decisions (those which produce a legal or similarly significant effect on you) are made using your personal data and based on solely automated processing with no meaningful human involvement, you have the right to have certain safeguards in place to protect your data subject rights, freedoms and legitimate interests. These safeguards include giving you information about the decision and enabling you to make representations, obtain human intervention, and contest the decision. In addition to also requiring the above safeguards, significant decisions made using special category personal data and based on solely automated processing are only permissible in certain specified scenarios (e.g. where you have given your explicit consent for the decision to be made using such data).

12.2 If you wish to exercise any of the rights set out above (free of charge), please contact us using the details set out in Section 18 (Contact details). If our legal basis for processing is consent and you wish to withdraw your consent, you can also use the method set out in Section 8 (What do we use your personal data for and why?).

12.3 Before we can process your request, we may need information from you to help us confirm your identity. This is a security measure to ensure that rights are being exercised by the correct person and to ensure that personal data is not disclosed to, erased by or altered by any person who has no right to do so.

12.4 For more information on the rights set out above and when they apply, please contact us at info@adviserly.io or see the guidance from the UK Information Commissioner on individuals' rights/other relevant supervisory authorities.

13. Who do we share your personal data with and where do we transfer your personal data to?

13.1 Personal data may be held at our offices and the third parties described below in subsection 13.4.

13.2 We may have to share your personal data with third parties for the purposes set out in the table in Section 8 (What do we use your personal data for and why?).

13.3 Some of the third parties are based outside the UK and/or the European Economic Area (EEA) so their processing of your personal data will involve a transfer of personal data outside the UK and/or the EEA. Whenever we transfer your personal data out of the UK and/or the EEA, we ensure

a similar degree of protection is afforded to it by ensuring at least one of the following safeguards is in place:

13.3.1 We may transfer your personal data to countries that have been granted an adequacy decision by the European Commission and/or an adequacy regulation by the UK Secretary of State (as applicable) confirming that the country in question provides an adequate level of protection for personal data; or

13.3.2 We may use specific contracts approved by the European Commission and/or the UK (as applicable) which ensure that personal data is adequately protected. When we rely on this measure, we will conduct risk assessments and take appropriate measures to ensure that the third-party can comply with the provisions of such contracts and we have confirmed that the country to which the personal data is transferred provides enforceable data subject rights and effective legal remedies for data subjects are available there; or

13.3.3 a specific exception applies under applicable data protection law.

13.4 Please see below for details of the third parties we share your personal data with and where we send your personal data:

Third party	Personal data shared	Reason for sharing personal data	Is your personal data sent outside of the UK/EEA?
Anthropic	Event data, publicly available information, Identity data, Contact data, Communication data, Profile and membership data	To support event introductions, referral strategy reports and our firm-finder tool, and to draft emails and translate profiles.	United States
Luma	Identity data, Contact data, Event data, Communication data	To manage event registration, attendance, event communications and event administration.	United States
Meta	Identity data, Contact data (including WhatsApp	To run our WhatsApp groups. Your WhatsApp number and profile	United States

	number), Communication data	information may be visible to other members of the relevant group.	
Microsoft	Identity data, Contact data, Communication data, meeting and attendance data, notes, recordings and transcripts where applicable	To provide email, calendar, collaboration, calls and meetings	United States
Pipedrive (including Nova AI notetaker and add-ins)	Identity data, Contact data, Communication data, Profile and membership data, Marketing data, Event data, call notes and transcripts	To manage member and prospect relationships, introductions, referrals, follow-up and call notes	United States
Stripe, Inc.	Identity data, Contact data, Financial data	To process payments, billing and refunds, and keep payment records	United States
GoCardless Ltd	Identity data, Contact data, Financial data	To process payments, billing and refunds, and keep payment records	United States
LabEight Technologies Inc. and its sub-contractor Matrix Media Solutions (P) Ltd	Contact data, Profile and membership data, Technical and usage data, Marketing data	To send marketing emails and run our marketing campaigns, and to analyse website use	Canada, India (protected by an International Data Transfer Agreement approved by the UK Information Commissioner).

		and campaign effectiveness.	
SiteGround	Technical and usage, and data processed through our hosted website	To host our website	Netherlands
Typeform	Identity data, Contact data, Communication data, survey responses, questionnaire responses, Event data	To collect post-event feedback and questionnaires, including for referral strategy reports	United States, Spain
Canva	Identity data including photographs and video	For marketing to promote Adviserly and our events to Members, Friends and non members	United States
WordPress and plug-ins (including Paid Memberships Pro and Map SVG)	Identity data, Contact data, Profile and membership data, Communication data, Technical and usage data	To operate Adviserly's website, manage website functionality, support online forms, website accounts, platform interactions and website administration	United States
Zapier	Identity data, Contact data, Communication data, Profile and membership data, Event data, Marketing data	To connect our systems and automate workflows	United States

13.5 We may share your personal data with HM Revenue & Customs, tax authorities, regulators, courts and law enforcement bodies in jurisdictions around the world where required by law.

13.6 If there is a change of ownership or control of our business, such as a merger, restructure, sale of the business or its assets or we acquire a new business, your information may be shared with the parties involved in this change. We will anonymise the information where possible and any recipients will be bound by contractual terms to keep such information confidential.

13.7 We may also share your personal data where necessary and subject to appropriate confidentiality obligations, with the following categories of recipients: sponsors and co-hosting member firms in connection with events; event venues; professional advisers such as accountants, lawyers and insurers; our EU representative; prospective investors and their advisers in connection with a financing or investment in our business.

13.8 We require all third parties to respect the security of your personal data and to treat it in accordance with the law and the terms of the contract we have in place with them where they are our third-party service providers. We do not allow our third-party service providers to use your personal data for their own purposes and only permit them to process your personal data for specified purposes and in accordance with our instructions.

13.9 Please contact us at info@adviserly.io if you want further information on the specific mechanism and safeguards used by us when transferring your personal data out of the UK and/or EEA or you would like more information about the third parties we share your personal data with.

14. How do we keep your personal data safe?

14.1 We have appropriate security measures in place to prevent your personal data from being accidentally lost, used or accessed in an unauthorised way, altered or disclosed. In addition, we limit access to your personal data to those employees, agents, contractors and other third parties who have a business need to know. They will only process your personal data on our instructions, and they are subject to a duty of confidentiality.

14.2 We also have in place procedures to deal with any suspected personal data breach and will notify you and any applicable regulator of a breach where we are legally required to do so.

15. How long do we keep your personal data?

15.1 We will only keep your personal data for as long as necessary for the purposes we collected it for, including for the purposes of satisfying any legal or accounting requirements. To determine the appropriate retention period for personal data, we consider the amount, nature, and sensitivity of the personal data, the potential risk of harm from unauthorised use or disclosure of your personal data, the purposes for which we process your personal data and whether we can achieve those purposes through other means, and the applicable legal requirements.

15.2 At the expiry of the relevant retention period, we will either delete your personal data or in some circumstances we may anonymise your personal data (so that it can no longer be associated with

you) for research or statistical purposes, in which case we may use this information indefinitely without further notice to you.

15.3 In the table below, 'after our relationship ends' means: (a) if you are, or work at, a Member or Friend, after you or your firm ceases to be a Member or Friend; (b) if you are, or work at, a prospective member firm or have asked to join Adviserly, after our last contact with you or your firm; and (c) in any other case (including event attendees, speakers, panellists and service providers), after our last contact with you or the end of the relevant event, whichever is later.

15.4 Details of retention periods are set out in the table below:

Data type	Retention period
Communication data	Retained for 2 years after our relationship ends, unless we need to keep it longer to comply with a legal obligation or to establish, exercise or defend legal claims.
Contact data	Retained for 2 years after our relationship ends, unless we need to keep it longer to comply with a legal obligation or to establish, exercise or defend legal claims.
Event data	Retained for 2 years after our relationship ends, unless we need to keep it longer to comply with a legal obligation or to establish, exercise or defend legal claims.
Financial data	Retained for 6 years after our relationship ends, unless we are required to keep it for a longer or shorter period for legal or regulatory purposes.
Identity data	Retained for 2 years after our relationship ends, unless we need to keep it longer to comply with a legal obligation or to establish, exercise or defend legal claims.
Marketing data	Marketing data will generally be retained for 2 years after our relationship ends, unless you opt out earlier or we need to retain limited suppression information to respect your opt-out.
Profile and membership data	Membership data will generally be retained for 2 years after our relationship ends, unless we are required to keep it for a longer or shorter period for legal or regulatory purposes.

Data type	Retention period
Referral value data	Retained for 2 years after our relationship ends, unless we need to keep it longer to comply with a legal obligation or to establish, exercise or defend legal claims.
Sponsor and preferred provider data	Retained for 2 years after our relationship ends, unless we need to keep it longer to comply with a legal obligation or to establish, exercise or defend legal claims.
Technical and usage data.	Retained for 2 years from collection.
Prospects who never join	Prospects data will generally be retained for 2 years after our last contact with you (including when you or your firm confirm you are not interested in joining Adviserly), unless you opt out earlier or we need to retain limited suppression information to respect your opt-out.
Nova call recordings and transcripts	Retained for 2 years after our relationship ends, unless we need to keep it longer to comply with a legal obligation or to establish, exercise or defend legal claims.

16. Third-party links on our website

16.1 Our website may include links to third-party websites, plug-ins and applications. Clicking on those links or enabling those connections may allow third parties to collect or share personal data about you. We do not control these third-party websites and are not responsible for their privacy statements. When you leave our website, we encourage you to read the privacy notice of every website you visit.

17. Complaints

UK GDPR

17.1 You have the right to make a complaint to us about the processing of your personal data or in relation to the exercise of any of your rights at any time by contacting us at info@adviserly.io.

17.2 You also have the right to complain to the ICO, who can be found via their website (www.ico.org.uk) or by telephone: 0303 123 1113.

EU GDPR

17.3 You have the right to complain to an EU data protection regulator, in particular, the regulator for the Member State in which you reside or work, or in the Member State where the activity which gave rise to the complaint occurred.

17.4 For a list of EEA data protection supervisory authorities and their contact details see here.

17.5 We would, however, appreciate the opportunity to discuss any issues or concerns you may have. Therefore, please feel free to contact us using the details set out below.

18. Contact details

18.1 If you have any questions about this notice, including any requests to exercise your legal rights, please contact us using the details set out below:

18.2 e: info@adviserly.io For individuals in the EEA you can contact us using the details above, alternatively, we have appointed EU Rep as our European Representative. They can be contacted using the details set out below:

e: info@eurep.ie

a: 26 Pembroke Street Upper, Dublin 2, Ireland

19. Cookies

19.1 Please see our cookie policy for details of the cookies we use on our website.

20. Jurisdiction-specific schedules

20.1 We work with law firms and individuals in many jurisdictions. Where the data protection law of a particular jurisdiction requires additional information or gives you additional rights, we set these out in a Schedule at the end of this Notice.

End of notice