

Jewish Care Pension Scheme - Privacy Notice

This Privacy Notice has been issued by the Trustee of the Jewish Care Pension Scheme (the Scheme). The purpose of this notice is to help you understand how we collect and use your personal information, and what your rights are in respect of that information.

Data controllers

The Trustee of the Scheme is Jewish Care Pension Trustees Limited and the Scheme Actuary to the Scheme is Michael Lawson of Barnett Waddingham LLP. The Trustee and Scheme Actuary of the Scheme are considered "joint data controllers" as we decide the purposes for and the means by which the personal data we hold is processed. The joint data controllers can be contacted as follows:

Address: Trustee of the Jewish Care Pension Scheme, c/o Barnett Waddingham LLP, Decimal Place, Chiltern Avenue, Amersham, Buckinghamshire, HP6 5FG
Email: jewishcare@barnett-waddingham.co.uk
Telephone: 0333 11 11 222

Use, transfer and storage of personal data

What information we collect about you

In the course of running the Scheme, we may require information from you in relation to your marital/relationship status (which may include the gender of your spouse or civil partner or unmarried partner) and/or information about your (or your partner's) health. Such information will be used by the Scheme's administrators to determine the benefits payable to you and your beneficiaries. In addition, we may hold any or all of the following items of personal information:

- Personal details including your name, National Insurance number, gender, age, date of birth, postal and/or email address and telephone number and details of your dependants and/or beneficiaries.
- Descriptions relating to your physical and mental health (to the extent that they are relevant to the calculation and payment of your benefits from the Scheme).
- Salary and data relating to your benefits under the Scheme as well as investments and pension assets held outside of the Scheme (for example, to the extent they are relevant in relation to taxation of your pension income).
- Employment history, including employment dates and historic pay records.
- Bank account details for payment of benefit instalments, HMRC tax code.
- If you have used a pensions dashboard, an online platform where you can access information about all or your pension benefits, a "pensions identifier", which is a string of characters used to identify your specific benefits under the Scheme.

In order to properly administer the Scheme and to calculate and pay benefits, from time to time we may also need to hold other information about you.

How we collect your personal information

Your personal data is provided to the data controllers by your current or former employer or may be obtained directly from you. We may also receive personal data from other parties such as HM Revenue & Customs, the Pensions Ombudsman, a tracing service or someone acting on your behalf such as in independent financial adviser. The personal data collected relates to your employment and membership of the Scheme. We will not collect any personal data that we do not need.

How long we keep your personal data for

Where there is a maximum limit on how long we can keep certain personal data for, such as in relation to pensions dashboards, we will comply with that restriction. But, given the nature of pension schemes, the Trustee is likely to need to keep some of your personal data for at least the lifetime of the Scheme.

Who we share your personal data with

The Trustee shares your data with the Scheme's administrators, Barnett Waddingham LLP, the Scheme Actuary, your current and former employers in the Scheme, and Additional Voluntary Contribution (AVC) or annuity providers and insurers. The Trustee may also share data with other professional advisers (such as the Scheme Auditor or Scheme lawyers), and regulatory bodies (including, but not limited to, HM Revenue and Customs, the Department for Work and Pensions the Pensions Ombudsman and the Pensions Regulator).

Your data may be shared by the Scheme's administrators with sub-processors for particular outsourced activities such as bulk printing jobs, confirmation of address/existence, offsite backup and archive. A comprehensive list of parties with whom data may be shared is set out in the Trustee's formal Data Mapping document, available on request in writing to the data controllers at the address above.

The Trustee may share relevant member data with the parties that form part of the "dashboard ecosystem" that enables pensions dashboard services to work such as the Scheme's Integrated Service Provider and the authorised Pensions Dashboard Programme (PDP) infrastructure providers to comply with its legal duties under pensions regulation. Any such data sharing will be carried out securely and only to the extent required for the operation of Pensions Dashboards. The Trustee remains the data controller for this activity and is responsible for ensuring that all transfers take place in accordance with applicable data protection laws.

How we use your personal data

The Scheme administrators, on behalf of the Trustee, will use your personal data to ensure that the correct benefits can be paid to you and that your requests can be dealt with efficiently, in accordance with the Trustee's **legal obligation** to run the Scheme in accordance with the Trust Deed and Rules. The Trustee and / or administrators may contact you directly in order to provide relevant information, or to deal with your queries.

The Trustee has a **legitimate interest** in using your personal information to:

- Keep up-to-date and accurate records about your membership of the Scheme (*so that the correct benefits can be paid*)
- Undertake risk-management exercises (*so that the risk your benefits are not paid is reduced*)
- Comply with the law, including regulations and guidance issued by the Pensions Regulator (*so that you, the Trustee and their advisers are not subject to legal sanctions which may impact benefits*)

The Scheme Actuary uses your personal data to advise the Trustee on the financial management of the Scheme. This advice helps to ensure the Trustee is able to meet their obligations to pay members' benefits, and is necessary to comply with obligations placed on them by legislation, including the Pensions Act 2004.

The Scheme Actuary may also use your personal data in research which assists actuaries in providing this type of advice - for example research into the mortality experience (life expectancy) of pension scheme members in general. This may include the provision of personal data, anonymised as far as possible, to a recognised external authority, such as the Continuous Mortality Investigation (CMI) which investigates mortality experience on behalf of the Institute and Faculty of Actuaries. The Scheme Actuary will not pass your personal data to any third party without the prior agreement of the Trustee.

The Trustee has conducted due diligence on their suppliers to ensure they process data within the UK and/or the EEA. Where data is sent outside the UK (to the EEA) appropriate safeguards are put in place to ensure that your data is kept secure.

Your rights in relation to your data.

The purpose of this Privacy Notice is to fulfil your right to be informed about the use of your personal data. In addition:

- You have the right to access your personal data. If you wish to request copies of your personal data please contact the data controllers at the address above.
- You have the right to have your personal data rectified if it is inaccurate or incomplete.

- You have the right to have your personal data deleted or removed if there is no reason for its continued storage and processing.
- You have the right to object to your personal data being processed (although the Trustee can override this in some circumstances) and to restrict the processing of your personal data in certain circumstances (for example whilst an issue around accuracy of data is being resolved). Please note that if you choose to exercise these rights then the Trustee may not be able to perform its duties in relation to the Scheme, and your benefits could be affected.
- You have the right to lodge a complaint to the Trustee if you consider that data protection legislation has been infringed because of the way your personal data has been handled. Further details about how to make a data protection complaint are contained in the Scheme's Internal Dispute Resolution Procedure (IDRP). You can obtain a copy of the IDRP by contacting the Trustee using the details given above under "Data Controllers". If you are not satisfied with our response to your complaint then we are happy to discuss it further with you and you are also able to complain to the Information Commission. Please see the Scheme's IDRP for further details.

Further details about GDPR and your rights under GDPR can be found on the IC's website at <https://ico.org.uk/>.

This notice is the latest version as at 22 June 2026. This notice will be updated from time to time and you can see the current version at any time on the Employer's website (<https://jewishcare.org/helpful-resources/reports-and-publications/pension>).

Alternatively, if you would prefer to receive a hard copy of the notice, please let us know (see contact details under "Data Controllers" above).

Trustee of the Jewish Care Pension Scheme
22 June 2026