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Butterfly

CLARITY THAT DECIDES

Privacy Notice (UK)

Butterfly Advisory is a trading style of **Butterfly International Ltd** (“we”, “us”, “our”). We are the **data controller** for the personal information described in this notice.

Contact details

- **Telephone:** 020 7060 0604
- **Address:** Cardinal Point, Park Road, Rickmansworth, Hertfordshire, WD3 1RE, United Kingdom
- **Email (Data Protection):** dpo@butterfly-advisory.com
- **Data Protection Officer / contact:** G Beige
- **ICO registration:** ZB928567

Last updated: 19 February 2026

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1) What this notice covers

This notice explains how we collect, use, store, share and protect personal information when you visit our website, contact us, book a consultation, or use our services.

2) Information we collect

We may collect:

- **Identity & contact details** (name, business name, role, email, phone, address).
- **Enquiry details** (what you need help with, timing, preferences, and communications).
- **Identity verification documents (where required)** (for example passport/driving licence and proof of address).
- **Documents you choose to share** (for example business information, financial summaries, forecasts, supporting documents).
- **Technical data** (IP address, device/browser data, pages viewed, and cookie data where enabled).
- **Call/meeting notes** (and recordings where used we will tell you where practical).

We do not intentionally collect information about children (under 18).

3) Data we receive from third parties

Where relevant and lawful, we may receive information from:

- **Public registers** (e.g., Companies House) and other publicly available sources.
- **Professional advisers** acting on your behalf (e.g., solicitors/accountants).
- **Verification and fraud prevention providers** used to help protect against impersonation and fraud.
- **Partners/providers** involved in progressing your request (where you ask us to coordinate introductions).

4) How we use your information and our lawful bases

We use your information to:

- **Respond to enquiries and arrange consultations.** (Legitimate interests / steps to contract)
- **Provide services and manage the relationship.** (Contract / legitimate interests)
- **Coordinate introductions and specialist support when requested.** (Contract / legitimate interests, and consent where required)
- **Protect against fraud and maintain secure operations.** (Legitimate interests / legal obligation where applicable)
- **Meet legal or regulatory obligations where applicable.** (Legal obligation)
- **Send marketing updates where you opt in.** (Consent)

Verification and fraud prevention

Where necessary to protect clients and reduce fraud risk, we may use identity verification and fraud prevention providers and check information against public sources. If a credit reference or fraud prevention check is required for a specific request, we will make this clear at the relevant stage.

Special category data

We do not actively seek special category data. If you provide it and it is necessary for a specific purpose, we will only process it where lawful and, where required, with your explicit consent.

5) Who we share your information with

We do **not sell** your personal information.

We may share information, where necessary and proportionate, with:

- **Service providers** that support our operations (e.g., website/hosting, CRM, email, telephony, scheduling, document management, security).
- **Professional advisers and specialist partners** (e.g., lenders/brokers, law firms, accountants, insurers or other specialists) where you request an introduction or where it is necessary to progress your enquiry.
- **Regulators, law enforcement or other parties** where required by law or to prevent fraud or protect rights.

We only share what is needed for the specific purpose.

6) International transfers

Some suppliers may process information outside the UK. Where this happens, we use appropriate safeguards to protect your information.

7) How long we keep your information

We keep personal information only as long as necessary for the purposes in this notice, then delete or anonymise it.

Typical retention (may vary depending on circumstances):

- **Enquiries not converted to clients:** up to **24 months** from last contact.
- **Client/project records:** typically **6–7 years** after the relationship ends (to support

contractual, legal, accounting and audit needs).

- **Marketing preferences:** until you unsubscribe (and we may keep a minimal suppression record to respect your choice).

8) Your rights

You have rights under UK data protection law, including the right to: access, correct, delete, restrict, object, and (in some cases) receive a portable copy of your information, and to withdraw consent where we rely on it.

To exercise your rights, email dpo@butterfly-advisory.com. We may need to verify your identity.

9) Marketing

We will only send marketing communications where you have opted in or where permitted by law. You can opt out at any time using the unsubscribe link or by contacting us.

10) Cookies

We use cookies and similar technologies to operate our website and, where enabled, understand usage and improve performance. You can manage your preferences via our **Cookies & Preferences** controls.

11) Automated decision-making

We do not typically make decisions about you based solely on automated processing that produces legal or similarly significant effects.

12) Security

We use appropriate technical and organisational measures designed to protect personal information against unauthorised access, loss, misuse or alteration. Access is restricted to those who need it for legitimate purposes.

13) Business changes

If we sell, transfer, or reorganise all or part of our business, we may share personal information with relevant parties (for example, advisers and prospective buyers) where necessary and subject to appropriate confidentiality safeguards.

14) Changes to this notice

We may update this Privacy Notice from time to time. The latest version will always be available on our website and the “Last updated” date will be revised.

5) Complaints

If you are unhappy with how we use your information, please contact us first at **dpo@butterfly-advisory.com**.

You also have the right to complain to the **Information Commissioner’s Office (ICO)**:
Information Commissioner’s Office, Wycliffe House, Water Lane, Wilmslow, Cheshire,
SK9 5AF
Telephone: 0303 123 1113
Website: ico.org.uk