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Security & Confidentiality

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Butterfly is built for decisions where privacy matters. We treat confidentiality as a standard of service, not an optional extra, and we apply practical controls to protect information throughout the client journey.

1) Confidentiality by default

We handle client information on a need-to-know basis and only use it to support your enquiry, engagement, or agreed work. We do not sell personal data.

2) Controlled information sharing

Where your request requires specialist input or an introduction, we share only what is relevant and proportionate, and only with parties necessary to progress the work. We aim to keep responsibility clear and communication controlled so information does not drift.

3) Secure communication and records

We apply appropriate safeguards designed to protect information against unauthorised access, loss, or misuse. This includes access controls, secure systems, and good record-keeping practices.

4) Identity, fraud and impersonation awareness

Fraud and impersonation risks are a modern reality. We may ask you to verify certain details before sharing sensitive information or progressing introductions, and we may delay action if something does not look right.

5) Your role in keeping things secure

To help protect your information, we recommend that you:

- Use trusted contact details and tell us promptly if they change.
- Avoid sending sensitive information over unsecured channels.
- Confirm instructions carefully before any high-risk action.
- Let us know immediately if you suspect fraud or impersonation.

6) Questions

If you have any questions about security or confidentiality, contact us:

Email: dpo@butterfly-advisory.com

Telephone: 020 7060 0604