

My Personal Finance Privacy Notice for young people participating in the Duke of Edinburgh scheme

Last updated May 2022

If you participate as a student in our My Personal Finance Skills programme which is operated in connection with the Duke of Edinburgh skills scheme, we, the [Chartered Insurance Institute](#) ("we", "us", "our"), will receive, handle and share certain information about you. The purpose of this notice is to explain what information about you will be processed, how and why.

If you have any questions, you could discuss this notice with your parent/carer or a family member. You can also contact us by email to skills@thepfs.org.

About us and our programme

My Personal Finance Skills is a free financial education workshop to help students understand more about how to manage money. Our main website is www.cii.co.uk and we also operate <https://mypersonalfinanceskills.org> and other websites. We are the so called "data controller" responsible for the personal data (see below) that we collect about you.

Information about you is also called your "personal data"

Your "personal data" includes any information about you such as your name, email address, home address, telephone number, age, school you go to, information about your assessments, a picture of you and most other information that relates to you.

It will also include so called "Special Category Personal Data" about your health, religious beliefs, race, ethnicity and similar information which we will treat extra carefully. For example, if you need additional support because of your health, we might need to know this so that we can help.

What personal data is processed, why and how?

Why?	How?	What?	Source	Legal ground
To review your application for the programme	<ul style="list-style-type: none"> Our system receives your online application Assess your eligibility and compare details provided by your school Contact you by email or telephone to confirm your participation 	<ul style="list-style-type: none"> Your name, email address, home address, school details Application details 	<ul style="list-style-type: none"> You Your school 	We need to process your information because otherwise we could not comply with the terms and conditions of your participation.
To assist in your participation in the programme and safeguarding	<ul style="list-style-type: none"> Send you programme materials Respond to your queries Assess your particular needs and implement safeguarding measures 	<ul style="list-style-type: none"> Your contact details Details of your enquiry 	You	As above.
To review your weekly assessments	<ul style="list-style-type: none"> To receive completed assessment from you Provide comments and guidance to you by email or telephone 	<ul style="list-style-type: none"> Your contact details Assessment results 	You	As above.
To submit your results to Duke of Edinburgh (DofE)	<ul style="list-style-type: none"> Through the DofE portal You will then be able to receive your DofE certificate 	<ul style="list-style-type: none"> Your contact details Programme results Please contact Duke of Edinburgh scheme here 	Our records	As above. Also, our legitimate interest in complying with our contract with DofE.

Why?	How?	What?	Source	Legal ground
		about how it will process your personal data		
Send you marketing about our programmes and organisation	<ul style="list-style-type: none"> • By email 	<ul style="list-style-type: none"> • Your contact details • Known and inferred interests 	Our records	Only with your consent.
To recognise you when you return to our website	<ul style="list-style-type: none"> • Like most websites we deploy cookies and similar technologies to recognise your computer or device to understand where users come from, what they do on our website and where they go afterwards 	Technical data about your device. For more information, please see our technical Cookie Policy with your parent, family member or teacher.	Our records	Only with your consent. However, some essential cookies that are necessary to provide our services will be deployed automatically.
Share information with your parent, family member or teacher	<ul style="list-style-type: none"> • We will speak to such adult and share information if contacted • We will let your school know if you passed or not and may suggest how to support you 	All relevant personal data but only where sharing your information is appropriate.	Our records	As required in our legitimate interest in operating the programme and acting in your best interest.
Administrative purposes and compliance with the law	<ul style="list-style-type: none"> • Safe storage of your information on our system, record keeping, troubleshooting, security monitoring, compliance, managing our service providers, preventing fraud, statistical analysis, sharing resources with our affiliated companies, transferring your information to our successor organisation. • Resolve complaints or disputes, comply with our legal obligations and comply with lawful requests from public authorities. 	All necessary personal data.	Our records	As required in our legitimate interest in the administration of our programme and organisation, our compliance with legal obligations and resolving legal claims.

Most information that we ask of you will be necessary for these purposes. We will rely on the information provided by you as correct but please let us know if this is not the case.

International transfer of your information

In most cases, your personal data stays in the UK. However, there may be occasions where we use a service located abroad where your information is then stored. In these cases, we will enter into appropriate contracts with the relevant party and take other appropriate measures to protect your information.

How do we keep your personal data safe?

We have an information technology (IT) department that looks after the information we hold, including your personal data. Our policies and procedures require that all information is only accessed by those individuals who need to see it for their tasks (e.g. our assessor will see your weekly assessments). We use the usual technical measures such as firewalls and passwords to safeguard your information.

How long do we keep your personal data?

We will keep your personal data while you are our student and for a period of 6 years after that. However, you can ask us to delete it earlier if you wish.

Your data protection rights

You can ask us for more information about how we handle your personal data, how we safeguard the transfer of your personal data abroad, and how long we keep your personal data. You can ask us for a copy of your information, change your information which you think is wrong, delete your information where there is no reason for us to keep it, to have your information transferred to another organisation like ours, to stop using your information or to only use it in certain ways.

Please email us if you wish to make a request. You can also contact and lodge a complaint with the Information Commissioner's Office. The ICO is a public authority which ensures that organisations comply with data protection laws. <https://ico.org.uk/>

Updates

If we make any changes to our notice you will be able to see them on this page. You should regularly check for updates, as indicated by the "Last updated" date at the top.