

Confidentiality Statement

Core Financial Paraplanning Limited understand that, as part of our work, we will have access to confidential information relating to clients of the firm.


I, Hannah Wynick, on behalf of Core Financial Paraplanning Limited, hereby undertake:

To take all possible steps to preserve strict confidentiality regarding any such information to which I have access through my work.

Never to pass any information obtained as part of my work to anyone outside the firm unless:

- We are required to do so by the Financial Conduct Authority or by law.
- We have been directed to do so as above, and the reasons for doing so are clearly understood.
- We believe, on reasonable grounds, that doing so would be in accordance with the Public Interest Disclosure Act.
- We believe, on reasonable grounds, that doing so would be in accordance with my obligations under Anti-Money Laundering rules.

We understand that any breach of the above will result in disciplinary action and may expose our Company to a suit for damages in a court of law.

Signed: 

Name: Hannah Wynick

Position: Managing Director of Core Financial Paraplanning Limited



Office
20 Birkdale Walk,
Alwoodley, Leeds,
LS17 7SX



Main Office
0113 2250 987



Email
info@corefinancialuk.com