

## **Email protocol – Chartmain Services Ltd**

Chartmain Services Ltd take the security of personal information very seriously.

### **About the risks**

The main risks associated with using email that concern Chartmain Services Limited are:

- Confidentiality and privacy - there is a risk that emails sent over the internet may be intercepted
- confirming your identity - it is crucial that we only communicate with established contacts at their correct email addresses
- there is no guarantee that an email received over an insecure network, like the internet, has not been altered during transit
- attachments could contain a virus or malicious code

### **How we can reduce the risks**

We will desensitise information, for example, wherever possible, by only quoting part of any unique reference numbers. We can offer the alternative of sending hard copy documents in the post, if you request this in advance.

We will never include your bank account details or those of third parties in emailed documents. If you require notification of such details, these will be sent to you by post. The firm's own bank details will be included in our invoices to you, but at our risk.

### **If you don't want to use email**

You may prefer that we don't correspond with you by email, for example because other people have access to your email account. If so, we are happy to respond by post or an alternative method. We can agree this with you either by telephone, fax or in writing via post.

### **If you do want to use email**

If you would like us to correspond with you by email, we will need you to confirm in writing by post, email or fax:

- that you understand and accept the risks of using email
- that you are content for financial information to be sent by email
- that attachments can be used

### **Please be aware**

If you do wish to correspond via email please note:

- your Client Reference must be shown in the subject line of the email
- there is a limit on the size of external emails sent to us – this can vary but is usually of 10 MB, this limit is the total of BOTH the text typed on the email together with any attachments being sent

### **Contacting you by email**

If you would like us to contact by email, we will need you to confirm:

- your full email addresses and anyone with whom we may correspond by email;
- any changes in your email address or addresses. It would be an extra security feature if you were to telephone us with the new details. If you do not do so, then emails are sent at your risk.
- that you have ensured that your spam filters are not set to reject and/or automatically delete our emails

### **How we use your agreement to this protocol**

Your confirmation will be held on file and will apply to future email correspondence and will be held on file for six years after you cease to be a client. If any changes are made you will need to make us aware of the changes.

### **If we receive email from someone we don't recognise**

If we receive email contact from someone we don't recognise from the information you gave us, we will verify the position with you before responding.

**Opting out**

You may opt out of using email at any time by letting us know.

**Notice applying to all emails sent by us**

The information in this e-mail and any attachments is confidential and may be subject to legal professional privilege. Unless you are the intended recipient or his/her representative you are not authorised to, and must not, read, copy, distribute, use or retain this message or any part of it. If you are not the intended recipient, please notify the sender immediately.

Chartmain Services Ltd computer systems will be monitored and communications carried on them recorded, to secure the effective operation of the system and for lawful purposes.

Chartmain Services Ltd are not liable for any personal views of the sender.

This e-mail may have been intercepted and its information altered.

Chartmain Services Ltd is Registered in England Co no 07217558. Director P Brown Bsc (Hons), FCCA,FCIE,DChA

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