National Friendly – Data Sharing List

Data processor*	Processing activities	Data Sharing
HealthHero	Administering our virtual GP service called 'Friendly GP,' accessible online and over the phone.	• Name • Address • Date of birth • Email address • Phone numbers • Gender • Age • Health Information
Progressive Advantage Ltd	Administering our customer relationship management (CRM) system.	• Name • Address • Date of birth • Email address • Phone numbers • Marital status • Gender • Age • Child details • Health Information • Bank details: account name, • account number, sort code. • National Insurance Number • Passport • Driving licence • Firearms licence • Birth certificate • Utility bill

HyrbrIT Services	Hosting of virtual servers / systems / data & desktops in a Data Centre.	• Name • Address • Date of birth • Email address • Phone numbers • Marital status • Gender • Age • Child details • Health Information • Bank details: account name, • account number, sort code. • National Insurance Number • Passport • Driving licence • Firearms licence • Birth certificate • Utility bill
Spark Data Systems	Administer our policy administration system.	• Name • Address • Date of birth • Email address • Phone numbers • Marital status • Gender • Age • Child details • Health Information • Bank details: account name, • account number, sort code. • National Insurance Number
Mailchimp	Administer the system National Friendly uses to send digital marketing campaigns.	• Name • Address • Date of birth • Email address • Phone numbers • Gender

Mailing Houses	To process marketing campaigns, providing you have consented to receiving marketing communications.	- Name - Address - Date of birth - Email address - Phone numbers - Marital status
SmarterPay (formerly APT)	To process BACS payments (Direct Debits and Claims Payments).	- Name – member, claimant, mentioned in will - Bank details: account name, account number, sort code – member, claimant - Member reference – member, claimant - Child details
Actuarial consultancy firm, OAC.	For model development purposes.	- Name, - Policy number - Date of birth - Member reference - Address - Age - Marital status - Bank details - Health/medical information - Gender - Smoker status
File Centre	Our external storage company may store your original application form, previous certificate of insurance and any notes regarding the initial set up of your policy.	- Name – member, claimant, mentioned in will - Address – member, claimant, mentioned in will - Date of birth – member, claimant - Bank details: account name, - account number, sort code – - Bank details: account name, account number, sort code - Marital status/certificate - Death certificate - Health information - Gender

Link Group (formerly HS Admin)	Third party administrators **(CABF Unit Linked Policies only).**	- Name - Address - Date of birth - Email address - Bank details: account name, - account number, sort code - Marital status/certificate - Death certificate - Gender
Trigon	Third party Administrators **(Pension policies only).**	- Name - Address - Date of birth - Email address - Bank details: account name, account number, sort code - Marital status/certificate - Death certificate - Health information - Gender
Hannover Re	To enable the management of your policy. They may also use such information for statistical and modelling purposes, compensation. queries, quotations, and morbidity **(Long Term Care Policies Only).**	- Name - Address - Date of birth - Email address - Phone numbers - Marital status - Age - Marital status - Policy number - Health/medical - information
Healix Health Services	Our claims administrator to process and pay claims **(Private Medical Insurance Policies Only**).**	- Name - Address - Policy number - Member reference - Phone numbers - Email address - Bank details (account name,

Alliance Health Group	Our previous claims administrator to process and pay historical claims. **(Private Medical Insurance Policies Only**).**	account number, sort code) • Date of birth • Cover level • Health information • Child details
AXA PPP	Our previous claims administrator to process and pay historical claims. **(Private Medical Insurance Policies Only**).**	
Inuvi Health	Providing health assessments and obtaining GP reports to assist with underwriting and the validation of claims.	• Name • Address • Policy number • Member reference • Phone numbers • Email address • Date of birth • Health information • Child details
Medallia	To contact customers for customer experience feedback.	• Name • Email Address
Civica	To process our invitations and proxy voting forms for the Annual General Meeting.	• Name • Address • Email address • Phone numbers

* A data processor is responsible for processing personal data on behalf of a data controller. The data controller determines the purposes and means of processing personal data.

**Includes Healthcare, HealthGuard, Healthcover, Optimum, Extensive and MyPMI policies.

Regulators	Processing activities	Data Sharing
Third parties	Who require your data to process a complaint, such as the Financial Ombudsman.	All policy information including claims history.
Law enforcement agencies and fraud prevention agencies	Where National Friendly are required to do so by law.	
Regulatory authorities such as ICO, PRA and FCA	If we are required to provide details for an investigation.	
Financial Services Compensation Scheme	If the event that the company is unable to meet its liabilities	

Third parties	Processing activities
EY auditors	Audit the annual accounts.
Other Insurers	Where you have an existing insurance policy in place so that we can coordinate our collective liability.
Your doctor or nominated health professional(s)	To assist with any required treatment and/or claim
Intermediaries	Any intermediary or agent appointed to act on your behalf.