



# Cookie Policy

Canaccord Genuity Wealth Management

A trading name of Punter Southall Wealth Limited, a Canaccord Genuity company.

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Like many companies, Punter Southall Wealth (we, us and our) uses cookies on the website <https://clientportal.canaccordgenuity.com> and <https://clientportal.adamandcompany.co.uk> (our sites) to collect information that allows our sites to work and helps us to enhance your online experience, discover how you use our site, measure the effectiveness of our web pages and understand what information is most useful to visitors.

This Policy explains what types of cookies are used on our sites and the purposes for which we use them.

We may periodically update the cookies we use and this Policy. Please note if we do you will be notified when you next visit our sites and you will be able to view the new Policy. You can also revisit this page if you wish to keep yourself informed.

## What are cookies?

A cookie is a text file containing information which is downloaded to your desktop or laptop computer, tablet or mobile device when you visit our sites. Cookies are useful because they allow our sites to recognise your device. Cookies are then sent back to our sites on each time you visit, enabling our sites to 'remember' you or your device. A cookie cannot read data off your hard drive or read cookie files created by other sites.

When we refer to cookies throughout this Policy, we intend to cover all similar devices including web beacons and log files.

## The type of cookies we use

The length of time cookies are stored on your device can vary, but they generally fall into two categories: session or persistent cookies.

- Session Cookies - session cookies are cookies which expire when you close your internet browser. We use session cookies to assign and store a session ID to you so that you can move uninterrupted between the areas of our site.
- Persistent Cookies - persistent cookies are cookies which are stored on your computer for longer periods of time e.g. for 24 hours, a week, or several years, depending on the function they're helping to perform. We use these to help us understand visitor patterns or to provide additional functions.

You can find more information about the individual cookies we use and the purposes for which we use them in the table below.

## The cookies we use on our site

Cookies are used on our sites by us and some of our service providers. The table below sets out which cookies are used and by which service provider.

## Social Media Plug-ins

We have also integrated components of LinkedIn and Twitter on our site. On each individual page that you visit, where the social media plug-in is integrated, your information will be collected by, transmitted to and stored by the provider of that social media plug-in.

Cookie Name	Source	Information collected	Purpose	Type	Expires
_ga	Google Analytics	How often you visit our site, the pages visited, your click-through on our site, total time spent on our site, the site you visited before our site, and whether you have visited our site before.	To estimate our audience size and usage pattern, and to look at customer trends.	Persistent	2 Years
_gat_gtag_UA_4541703_21	Google Analytics	How often you visit our site, the pages visited, your click-through on our site, total time spent on our site, the site you visited before our site, and whether you have visited our site before.	To estimate our audience size and usage pattern, and to look at customer trends.	Persistent	2 Years
_gid	Google Analytics	How often you visit our site, the pages visited, your click-through on our site, total time spent on our site, the site you visited before our site, and whether you have visited our site before.	To estimate our audience size and usage pattern, and to look at customer trends.	Persistent	2 Years
cookie_notice_accepted	Punter Southall Wealth Limited	Details of whether you have accepted our cookies.	To store information about your cookie policy acceptance	Persistent	1 Month
Psigma_1	Psigma Website	Your viewing preferences e.g. layout, sizing preferences, language etc.	To store information about your preferences and to customise our site to your interests.	Persistent	1 month
Psigma 1	Psigma Website	Your IP address, browser type and operating system	To speed up your searches.	Persistent	1 month

The information collected and transmitted includes your IP address, the address of the website the social media plug-in is located, your browser information and operating system used, date and time the website was accessed or activated.

## How to manage cookies

We will only set non-essential cookies on your device if you have provided consent. If you are concerned about having cookies on your device, you can use your browser settings to:

- delete all cookies;
- block all cookies;
- allow all cookies;
- block third-party cookies;
- clear all cookies when you close the browser;
- open a 'private browsing' / 'incognito' session, which allows you to browse the internet without storing local data;
- notify you each time new cookies are placed on your device; and
- install add-ons and plug-ins to extend browser functionality

You can find out more information about controlling cookies from:

- [Internet Explorer](#)
- [Chrome](#)
- [Firefox](#)
- [Safari](#)
- [Opera](#)

In addition, if you use [Firefox](#) or [Internet Explorer 11](#) there is an option to turn on the Do Not Track functionality, which allows you to tell websites not to track you. Google has also published a browser add-on to allow you to choose what information about the websites you visit is sent to Google Analytics, this can be downloaded [here](#). Full details on the cookies set by Google Analytics are published on the Google website.

Please note: if you choose to disable some or all cookies, you may not be able to make full use of our sites and some useful features will not work.

## Questions

If you have any questions or concerns regarding our use of cookies, or if you want to exercise any of your data protection rights, you can contact us. You will also find more information about how we process any personal data we collect about you when using cookies in our Privacy Notice.



[www.canaccordgenuity.com/wealth-management-uk](http://www.canaccordgenuity.com/wealth-management-uk)

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