

## Privacy Policy

IMMENSUS WEALTH LLP 's key objective is to provide personalized and customized investment solution to their clients (referred to as “Services”) under the given framework and compliance laid down by SEBI and AMFI. We are mutual fund distributor and have qualified members in the organization to create and counsel on financial planning's of individuals.

By using the website [www.immensuswealth.com](http://www.immensuswealth.com) and/or signing up for our services, and/or providing us your personal information/detail/documents through any means /mechanism for availing our services, you agree to this Privacy Policy hereby provide your express, unequivocal and unambiguous consent for availing our Services and processing your personal data/ information by IMMENSUS WEALTH LLP and/or authorised third party processors for providing services and/or undertaking desired investments and have read our disclaimers/ terms and conditions provided below, properly.

This is to confirm that all the data provided in the website are extracted from some third party source or have been bought for the purpose of representations. Any error or mistakes there in should be reported to us immediately. We are not responsible for any loss due to the mistakes, error or our general advisory provided here on the website.

### **1. Using IMMENSUS WEALTH LLP as a Visitor.**

If you are a first-time visitor to IMMENSUS WEALTH LLP:

- i. We don't know who you are.
- ii. We collect technical data about your interaction with the Services. This is data we get from your use of our services. We collect data about your interaction with our website, such as pages visited and average time spent on the website, your internet protocol address, the unique identifier of your device and device information such as operating system, operating system version, browser plugins, crashes, system activity, hardware settings, date and time of your request and referral URL, and cookies that may uniquely identify your browser and mobile application.
- iii. We use this data to analyse how you use our website and improve the services provided through the website.

### **2. Using IMMENSUS WEALTH LLP as a Registered User.**

If you have provided us your email address:

- i. You are a registered user of IMMENSUS WEALTH LLP.

- ii. You may be asked to give us additional information/personal information/data such as your name or mobile number (referred to as “Personal Data”) in order to use certain features of the Services.
- iii. We also collect technical data about your interaction with the Services.
- iv. We use all the collected data to
  - Respond to your queries about the Services.
  - Deliver to you any notices, alerts, or communications relevant to your use of the Services.
  - Offer you other products or services that we believe may be of interest to you. You have the option to opt-out of receiving such communication.

### **3. Using IMMENSUS WEALTH LLP as an Investor.**

If you wish to start investing in mutual funds through IMMENSUS WEALTH LLP:

- i. You will be asked for basic registration information, such as an email address and password.
- ii. You will be asked to provide personal information/data/sensitive personal information including your name, address, age, marital status, gender, income, your bank account and other payment instrument details etc.(also referred to as “Personal Data”)

We use this information to put you across the BSE STAR MF transaction platform for seamless transactions receiving such communication.

### **4. Usage and processing of Personal Data collected from you.**

Simply put, under no circumstance will we sell or rent your personal information to anyone, for any reason, at any time.

Your email address is used to exchange data and information for providing our Services and send you updates regarding the Services and/or other information/details that maybe useful for you. You can select what communication you'd like to receive from us by modifying your account settings after you login to your IMMENSUS WEALTH LLP account.

Your password is encrypted before being stored in our database and no one other than you knows or has

access to it. Under no circumstance do we know or share your password with anyone.

In order to start investing through IMMENSUS WEALTH LLP, we will need to verify your identity and complete all the required compliance of the regulators. To do so, we may, directly or through third parties, use the identification information you provide to verify it against databases maintained by a KYC (Know Your Client) Registration Agency, registered under the Securities and Exchange Board of India {KYC (Know Your Client) Registration Agency} Regulations, 2011, and the Unique Identification Authority of India.

We may also use your information to verify your identity in the event you contact us for assistance with the site or services.

However, in case if any of the Personal Data/ information is found to be inaccurate/ incorrect/incomplete, you shall be required to intimate us of the same for immediate amendment/updating of the same, by writing to us on the below mentioned contact details from registered e-mail address. Please be cautioned that, IMMENSUS WEALTH LLP and any person acting on its behalf shall not be responsible for the authenticity of the Personal Data or information supplied by you.

We use cloud-based software tools to perform certain business-related functions. Examples of such functions include, maintaining databases and servers, processing text messages, phone calls, chats and emails, and marketing and sales analytics. Please note that these providers are bound by the same standards of data security practices and procedures as we are under law and contract. Further, just like any other financial services company, we use authorized third-party service providers/data processors who are bound by the same standards of data security practices and procedures as we are under law and contract. They are subject to the comply with all applicable laws ,as we are while processing your Personal Data.

## **. 5. Security Practices and Procedures.**

IMMENSUS WEALTH LLP follows industry best practices, using open and known principles when transferring and storing your data.

We believe the biggest threat to the security and privacy of your data is if someone – probably someone you know – gains access to any of your devices. Remember to keep your password safe and secret to prevent unauthorised access to your IMMENSUS WEALTH LLP account.

If you think that the security of your IMMENSUS WEALTH LLP account has been compromised, change your password and contact us immediately for further assistance.

However, if we come across any incidence of data breach or threat to the security and privacy of your data, we shall duly notify you on your registered e-mail address and the relevant statutory body/ies as maybe required under applicable Indian Laws.

## **6. Our Legal Obligation to You.**

We are bound by the applicable Indian Laws such as the Information Technology Act, 2000, The Digital Personal Data Protection Act, 2023, etc and comply with all the applicable provisions available, [www.immensuswealth.com](http://www.immensuswealth.com) and all its service providers/data processors are obliged to maintain reasonable security procedures to safeguard your Personal Data or information and prevent any breach of Personal Data or information provided to us/. Further, despite our best efforts and that of the third-party data processors, if unauthorized persons breaches our security control measures resulting in data breach, data leak, misuse of data etc., IMMENSUS WEALTH LLP, their directors, officers, employees or affiliate's will not be responsible in any manner whatsoever.

Further, you shall have the right to seek a readable copy of the Personal Data or information you have provided us, processing activities undertaken by us with respect to the Personal Data, identities of all our third-party data processors and/or any other information with respect to your Personal Data or its processing . If you would like a any of the aforementioned detail/information, do get in touch with us at the address provided below. Upon receipt of such request from your registered e-mail address, IMMENSUS WEALTH LLP may, on a best-efforts basis, provide the requested information within 45 (forty-five) days.

## **7. Availing Services for the benefit of Minors and/or as Guardian:**

For availing our Services for the benefit of your minor child/children /or as a Guardian for person with disability, you may be required to provide Personal data of the minor child/children/ person with disability and/or such further information as maybe required to provide

## **8. Retention of Personal Data**

Notwithstanding anything contained herein, we and /or our third- party data processors, may retain your personal information/data/sensitive personal information for as long as required to avail our Services by continuing to correspond with us via e-mail, phone, WhatsApp, telegram etc or otherwise if required under any law or for exercising legal rights or defence of legal claims.

## **9. Withdrawal of Consent**

You may withdraw your consent at any time with effect for the future in writing to us from your registered e-mail address to the below mentioned contact details, The withdrawal of consent will not affect the lawfulness of processing based on consent before its withdrawal. Upon receipt of such request, we may not be able to offer you any further services; however, your Personal Data/ Information will be retained by us as per the extant laws and as stated hereabove. However, if you have availed any services/products/facility from us, we shall have the right to continue processing your information till such investments are in existence.

## 10. Grievance Redressal

Any grievances and/or any other request relating to your Personal Data may be addressed to our Grievance Redressal Officer at the email address given below:

Grievance Redressal Officer

Name: Sonali Batra

Contact Details:

Tel: (Board) 011-40565466

(Direct): 8376080607

Email: [sonali@immensuswealth.com](mailto:sonali@immensuswealth.com)

## **11. Changes to This Privacy Policy.**

This Privacy Policy is published on the website in compliance with Regulation 4 of the (Indian) Information Technology (Reasonable Security Practices and Procedures and Sensitive Personal Information) Rules, 2011.

We update this Privacy Policy periodically. We will notify you of any changes to this Privacy Policy. The date of last revision appears at the top and all changes take effect immediately upon posting.

If you do not agree with the terms of this Privacy Policy or any changes made to this Policy, please cease using all Services immediately and write to us at the address mentioned under our contact section