

The Parker Hannifin Pension & Death Benefit Plan (the “Plan”)

Privacy Notice

Parker Hannifin Pension Trustees Limited (the “**Trustee**”), as the trustee of the Plan, holds and processes personal data about Plan members and beneficiaries in order to run the Plan. In doing so, we comply with relevant data protection legislation.

What we do with your data

As a data controller, the Trustee collects and processes your personal data for the purposes of complying with its legal duties to administer the Plan and for other legitimate purposes relating to the operation of the Plan, which include:

- calculating, administering and paying your benefits under the Plan or following your death;
- processing ill-health retirement claims;
- dealing with any queries/complaints/appeals etc. regarding decisions we have made, for example in relation to your or your dependants’ entitlement to benefits under the Plan;
- carrying out actuarial valuations and investment of the Plan’s assets; and/or
- compliance with legal, regulatory and good governance obligations and as otherwise lawfully permitted from time to time.

Whilst much of the data we hold has been provided by you, we also hold and process data provided by third parties such as Parker Hannifin Manufacturing Limited, the Plan’s principal employer, Parker Hannifin Limited and Parker Hannifin (UK) Limited the participating employers (together, the “**Companies**”), other former participating employers, other pension schemes from which members have transferred, HMRC, the DWP and other regulatory bodies and tracing organisations. We also receive information from you about your proposed beneficiaries, who would be eligible to receive benefits on your death. We assume that you have the consent of those individuals to provide us with this information and that you will share this privacy notice with them. We will not provide a copy of this notice to those individuals as to do so is likely to seriously impair our ability to properly pay the benefits due under the Plan.

What data is processed?

The data we hold about you (and your beneficiaries) is to assist the Trustee in calculating, administering and paying benefits and includes (but is not limited to):

- full name, age, gender, date of birth, national insurance number, passport or ID number, and/or other governmental identification numbers;
- business and/or personal contact details, including address, telephone numbers and email addresses;
- financial information, including salary, tax information, pension or prospective pension entitlement and bank account details;
- employment details, including years of service, dates of employment, full or part time employment status, job band, salary, compensation, employee claims, bonuses and benefits;
- pension scheme status, including date of joining and date of leaving the Plan;
- your preferences in relation to your pension benefits; and
- marital status and relationship data, including the full name, date of birth, contact details and relationship to your family members, dependants and/or beneficiaries.

We also hold and process some special categories or “sensitive” data about individuals for the purposes of administering the Plan (for example in relation to ill-health or death benefits). We will in most circumstances process this data in the performance of our legal obligations in connection with employment, social security and

social protection (as allowed by legislation). If there are any occasions where we seek your explicit consent to process your sensitive data, then you can withdraw it at any time.

Who else processes your data?

We share your personal data with certain third parties involved in running the Plan, for example, the Plan's administrators (currently XPS for the DB Section and Fidelity for the DC Section), the Plan actuary and actuarial team (currently James Hughes and LCP), the Trustee's legal advisers (currently CMS), the Companies' legal advisers, the Plan's auditor (currently Mercer & Hole), the Plan's pension payroll administrator (currently Quantum Advisory), the Plan's bulk purchase annuity provider (currently Aviva Life & Pensions UK), life assurance providers, insurers, investment managers, additional voluntary contributions providers, HMRC, DWP, the Pensions Regulator, the Pensions Ombudsman, the Pensions Advisory Service and other such advisors and providers appointed from time to time.

The Plan's administrators also share your personal data with Integrated Service Providers (ISP) for use in the Pensions Dashboards Programme, which is set up by the UK Government's Department for Work and Pensions (DWP). Fidelity will share your data with Heywood Pension Technologies, and XPS will share your data with ITM and Pension Fusion.

In addition, we make your personal data available to the Companies and any other employers associated with the Companies, or to companies and firms which are considering or have acquired one or all of the Companies or the whole or part of the Companies' business, or the trustee(s), administrators or professional advisers of any pension scheme to or from which your rights under the Plan may be, are being or have been transferred, or to any company participating in such a pension scheme.

Your personal data will also be released to other external parties if authorised by you, or as required or permitted by law, or to comply with a judicial proceeding, court order, request from the Pensions Regulator, Pensions Ombudsman or any other regulator or any other legal process served on or involving the Trustee.

In some circumstances responsibility for your personal data is shared with the Plan Actuary, the Trustee's and/or the Companies' legal advisers (who process your data to comply with their professional duties as advisers to the Trustee and the Companies respectively), insurers, auditors and the Companies (as data controllers). The Companies hold and process your data to comply with their legal obligations as the employers of the Plan. The Companies have a legitimate interest in the Plan being run in a cost-efficient way and process your data to offer certain options to members. The Trustee will share information with the Companies, their auditors and advisors for this purpose.

The Trustee, the Companies, Fidelity, LCP, Quantum, XPS and other advisers from time to time may transfer Plan personal data to other countries, including outside the European Economic Area. Where transfers are made outside the European Economic Area, the parties involved will ensure that adequate safeguards are in place.

Storage of your personal data

Pension benefits can be paid over a long period and your right to benefits under the Plan is based on information which may go back many years. Our policy is therefore to retain information relating to you until after your membership of the Plan ends.

Once your membership ends and all payments to you and any beneficiaries cease, we may decide to delete some of the data held in relation to you after 12 years. However, information will be held for longer where we consider it appropriate in order to ensure the Plan pays the correct benefits and to deal with any queries relating to your benefits that arise after that time.

After the termination of the contracts between the Trustee and LCP, Prudential and/or Punter Southall, those parties will hold on to your personal data for a period of time which will be subject to the agreement of the Trustee. This is so that those parties can protect themselves against any subsequent legal claims.

Other third parties will hold data in accordance with the terms of the GDPR and the contractual provisions in place with the Trustees.

Your rights

You have the right to obtain access to, or copies of, your personal data and request that we rectify any errors in the data that we hold, or request that we erase your personal data. You can also ask that we restrict the way we process your personal data or object to its processing. In some circumstances, you have a right to request a copy of your personal data for the purposes of transmitting elsewhere. You can exercise these rights by contacting the Trustee via Janet Ward at Parker Hannifin Pension Trustees Limited, Dukesway, Team Valley Trading Estate, Gateshead, NE11 0PZ or janet.ward@parker.com or 0191 402 9046. Please notify us as soon as possible if there has been a change in your details (for example if your personal circumstances such as your nominated beneficiary or home address change).

Where we have requested and obtained your consent to process particular information, you can request to withdraw that consent at any time. However, if we do not hold all the data we need to administer your benefits, we will not be able to pay out the benefits you are entitled to.

Contact details

If you want to know more about the information held by the Trustee, the purposes for which it is held or about the Plan's data protection arrangements, please contact the Trustee as follows:

Janet Ward at Parker Hannifin Pension Trustees Limited, Dukesway, Team Valley Trading Estate, Gateshead, NE11 0PZ or janet.ward@parker.com or 0191 402 9046.

What if you have a complaint?

To make a complaint about how we've handled your information, please contact us as set out above.

If you are not satisfied with our response to your complaint or believe our processing of your information does not comply with data protection law, you can make a complaint to the Information Commissioner's Office. This is in addition to and separate from the Plan's internal dispute resolution policy.

Its contact details are:

Address: Information Commissioner's Office, Wycliffe House, Water Lane, Wilmslow, Cheshire SK9 5AF

Website: <https://ico.org.uk/>

Telephone number: 0303 123 1113 or 01625 545 745

The Trustee reserves the right to amend this privacy notice from time to time and will post the latest version of the privacy notice on the Plan website: www.parkerpensionplan.com.

21 February 2025

