**Cookie policy (UK)**

Last updated 25 February 2021

**1. Who are we?**

This cookie policy is issued by intelliflo Limited (“intelliflo”, “we”, “our” or “us”). Our registered office is at Wellington House, 60-68 Wimbledon Hill Road, SW19 7PA. intelliflo is a technology company that provides business management solutions to financial advisors and institutions through our cloud-based solution and services. You can find more information about our solutions and services on our website.

**2. What are cookies?**

A cookie, also known as a browser cookie, is a small text file which may be downloaded to your computer or device when you visit a website or use an app. Different types of cookies are used to do different things. These include letting you navigate between different pages on a website efficiently, remembering preference you have given and helping us identify ways to improve your overall site experience. Others are used to provide you with advertising which is more tailored to your interests, or to measure the number of site visits and the most popular pages users visit.

We also use other similar technologies such as pixel tags (which is a graphic image that loads when you visit a website or open an email, and tracks some of your activities) for example, to learn whether you have opened the emails we sent you or which links you have clicked on to help us better understand what content or products may be of interest to you.

This Cookie Policy sets out the types of cookies that we use and what we use them for.

**3. What is the purpose of this cookie policy?**

This cookie policy sets out the types of cookies that we use and what we use them for. We may change this cookie policy from time to time and then we will make the updated cookie policy available on our website. The date at the bottom of this page indicates when this cookie policy was last updated.

**4. Are there different types of cookies?**

Yes, there are different types of cookies - detailed below:

**4.1 ‘First party’ and ‘third party’ cookies**

Cookies can be set and controlled by the operator of a website such as intelliflo for this website (known as a ‘first party’ cookie) or a third party such as Facebook, for example to display advertisements and social sharing features (known as a ‘third party’ cookie).

**4.2 Are there other cookie distinctions?**

Yes, the following distinctions of cookies can be made:

1. **Session cookies**

Session cookies are stored in your computer or device's memory during your browsing session and are automatically deleted from your computer when you leave a website. These cookies usually store a session ID, allowing you to move from page to page without having to log-in repeatedly. They are widely used by commercial websites; for example, to keep track of items that a consumer has added to a shopping basket. Session cookies do not collect any information from your computer or device and they expire at the end of your browser session.

1. **Persistent cookies**

Persistent cookies are stored on your computer or device and are not deleted when your browser is closed. Persistent cookies can be used to retain your preferences for a particular website, allowing those preferences to be used in future browsing sessions. Persistent cookies usually assign a unique ID to your browser and they are usually configured to identify you for a prolonged period of time, from days to months or even years.

1. **Strictly necessary cookies**

These are essential for the operation of a website, e.g. to enable users to log in to secure areas of a website. These let you move around our website and use essential features such as accessing secure areas of our website and identifying you as being logged in. These cookies don't gather any information about you that could be used for marketing or remembering where you've been on the internet. Because these cookies are essential to deliver our website, or provide the services you have asked for, we do not need to obtain your consent to use them. If you disable them, our website may not be able to function properly.

1. **Analytical/Performance cookies**

These allow us for this website to recognise and count the number of visitors to a website, thereby assisting us to improve how our website works. We use these cookies, sometimes referred to as ‘web analytics’ information, to collect information about how visitors use our website. This includes details of the site where the visitor has come from, pages viewed, which content visitors are clicking on, which products visitors are interested in and purchase and at what point a visitor leaves our website. We use this information to improve the way our website works, for example, by ensuring that users are finding what they are looking for easily. All information these cookies collect is aggregated and therefore anonymous. On occasion we may share this information with analytics and search engine providers that assist us in the improvement and optimisation of our site. Alternatively, we may work with third-party suppliers who place cookies on your device and report on ‘web analytics’ information.

1. **Functionality cookies**

These are used to recognise users when they return to a website, enabling personalisation of content and user preferences, e.g. language or region. We use these cookies to recognise users when they return to a website. They enable the personalisation of content, the recognition of users and remember user preferences (for example, their choice of language or region). We use the information to improve our website and enhance our visitors' experience.

1. **Targeting cookies**

These record a user's visit to a website, the pages visited and the links followed, thereby tracking a user's movements which allows behavioural profiles to be created and used for targeted online advertising. These cookies are used to collect information about your browsing habits in order to deliver adverts more relevant to you and your interests. They remember that you have visited a website and this information is shared with other organisations such as advertisers.

They are also used to limit the number of times you see an advertisement as well as help measure the effectiveness of the advertising campaign. We will use the information to provide you with advertisements that are tailored to you. In addition, we may engage third party advertisers and advertising networks to place targeted advertisement cookies. This means that data collected through these cookies will be shared with such parties in order that they can select and serve relevant adverts to you and others.

We do not disclose information about identifiable individuals to our advertisers, but we may provide them with aggregate information about our users to assist them in performing this service. We may also use such aggregate information to help advertiser reach the kind of audience they want to target. You can opt-out of many third-party targeting cookies at <https://optout.networkadvertising.org/>.

Where we intend to use analytical/performance, functionality and targeting cookies or other similar technologies, we will seek your consent. The cookies that we use are set out in the table in section 7 below.

**5. Why do we use cookies?**

We use cookies help us to track visitor information and to learn about the behaviour of visitors to our website and how they respond to our marketing communications and for research and statistical purposes.

As detailed in our [privacy notice](https://www.intelliflo.com/uk/privacy-policy), we may disclose data collected from cookies, such as visitor trends, to third parties, in an anonymous form, for research and statistical purposes, and to help us optimise our websites and the targeting of advertisements.

The cookies that we use do not collect personal data such as name, address, email address and do not link any information they collect to an individual. From time to time we may also analyse IP addresses, user agent strings or other anonymous data sources.

Please note that although the use of data by us is covered by this cookie policy, in addition the use of third-party cookies is covered by third-party cookie policies, which we have referred to in the table in section 7, and may be available on the relevant company's website.

**6. How can you control the use of cookies?**

You can refuse, accept or remove cookies at any time by using the settings on your internet browser. You can configure your internet browser to warn you each time a new cookie is about to be stored on your computer so that you can decide whether to accept or reject it. Please refer to your internet browser's help section for further information. Please note that some parts of our website may not function properly if you reject cookies.

Based on your browser, follow these instructions to manage your cookie settings:

* Google Chrome - <https://support.google.com/chrome/answer/95647>
* Apple Safari - <https://support.apple.com/kb/ph21411>
* Mozilla Firefox - <https://support.mozilla.org/en-US/kb/enable-and-disable-cookies-website-preferences>
* Internet Explorer - <https://support.microsoft.com/en-gb/help/17442/windows-internet-explorer-delete-manage-cookies>
* Microsoft Edge - <https://privacy.microsoft.com/en-us/windows-10-microsoft-edge-and-privacy>
* Opera - <https://www.opera.com/help/tutorials/security/privacy/>

You can find a list of countries deemed by the European Commission as providing an adequate level of protection at https://ec.europa.eu/info/law/law-topic/data-protection/international-dimension-data-protection/adequacy-decisions\_en.

You can obtain a copy of the standard data protection clauses at https://ec.europa.eu/info/law/law-topic/data-protection/data-transfers-outside-eu/model-contracts-transfer-personal-data-third-countries\_en.

You can find further information about cookies and how to manage your cookie settings on [www.allaboutcookies.org](https://www.allaboutcookies.org/) or <http://www.youronlinechoices.eu/>

**7. Cookies we use**

Below we set out in detail the cookies that we use on this website, their function and the data they collect.

|  |  |  |  |
| --- | --- | --- | --- |
| **Cookie name** | **Provider** | **Expiry** | **Description** |
| **Necessary** | | | |
| BrowserId\_sec | Salesforce | 8 months | Used for security protections |
| **Functional** | | | |
| \_\_cf\_bm | Cloudflare | 1 month | Manages content delivery |
| \_\_cfduid | Cloudflare | 1 month | Protects against malicious visits to the site |
| CONSENT | Google | 15 years | Check on whether consent is provided for Google Analytics |
| \_\_cfruid | Cloudflare | Session | Manages content delivery |
| SIDCC | Google | 1 year | Secures user data from unauthorised access |
| intelliflo-market | intelliflo | No expiry | Remembers chosen geographical region for a user |
| cookie:accepted | intelliflo | No expiry | Checks whether cookie consent has been received or not |
| **Analytics** | | | |
| \_\_utmz | Google Analytics | 6 months | Providing anonymous analytics on site usage |
| \_\_utma | Google Analytics | 2 years | Providing anonymous analytics on site usage |
| \_\_utmc | Google Analytics | Session | Providing anonymous analytics on site usage |
| \_mkto\_trk | Marketo | 2 years | Track site usage for intelliflo marketing purposes |
| \_ga | Google Analytics | 2 years | Providing anonymous analytics on site usage |
| \_gcl\_au | Google Tag Manager | 1 month | Providing anonymous analytics on site usage |
| \_gat\_gtag\_UA\_29102989\_1 | Google Analytics | Immediate | Providing anonymous analytics on site usage |
| \_gid | Google Analytics | 1 day | Providing anonymous analytics on site usage |
| OTZ | Google Analytics | 1 month | Providing anonymous analytics on site usage |
| wistia-video-progress-XXXX | Wistia | No expiry | Provides analytics on video usage |
| wistia | Wistia | No expiry | Provides analytics on video usage |
| **Advertising** | | | |
| NID | Google | 6 months | Personalised advertising on Google sites |
| APISID | Google | Personalised advertising on Google sites | HSID |
| HSID | Google | 2 years | enable Google to collect user information for videos hosted by YouTube |
| SAPISID | Google | 2 years | enable Google to collect user information for videos hosted by YouTube |
| SID | Google | 2 years | Personalised advertising on Google sites |
| SSID | Google | 2 years | enable Google to collect user information for videos hosted by YouTube |
| \_\_Secure-3PAPISID | Google | 2 years | Builds profile of user interests |
| \_\_Secure-3PSID | Google | 2 years | Builds profile of user interests |
| \_\_Secure-3PSIDCC | Google | 2 years | Builds profile of user interests |
| Unclassified | Sentry.io | 1 year | Helps report on site errors |
| **Marketing** | | | |
| \_fbp | intelliflo | 3 months | Used by Facebook to deliver a series of advertisement products such as real time bidding from |
| \_\_gcl\_au | intelliflo | 3 months | Used by Google AdSense for experimenting with advertisement efficiency across websites using their services. |
| 1P\_JAR | Google | 29 days | Collects information on visitor behaviour on multiple websites. This information is used on the website, in order to optimise the relevance of advertisements. |
| ads/ga-audiences | Google | Session | Used by Google AdWords to re-engage visitors that are likely to convert to customers based on the visitor's online behaviour across websites. |
| bcookie | LinkedIn | 2 years | Used by the social networking service, LinkedIn, for tracking the use of embedded services. |
| bscookie | LinkedIn | 2 years | Used by the social networking service, LinkedIn, for tracking the use of embedded services. |
| CONSENT | Google | 6,693 days | Used to detect if the visitor has accepted the marketing category in the cookie banner. This cookie is necessary for GDPR compliance of the website. |
| IDE | DoubleClick | 1 year | Used by Google Double Click to register and report the website use r's actions after viewing or clicking one of the advertiser's ads with the purpose of measuring the efficacy of an ad and to present targeted ads to the user. |
| lidc | LinkedIn | 1 day | Used by the social networking service, LinkedIn, for tracking the use of embedded services. |
| NID | Google | 6 months | Registers a unique ID that identifies a returning user's device. The ID is used for targeted ads. |
| pagead/1p-user-list/# | Google | Session | Unclassified |
| test\_cookie | DoubleClick | 1 day | Used to check if the user's browser supports cookies. |
| tr | Facebook | Session | Used by Facebook to deliver a series of advertisement products such as real time bidding from third party advertisers. |
| wistia\_distillery\_cookie | Wistia | Persistent | Used in context with video advertisement. The cookie limits the number of times a visitor is shown the same advertisement content. The cookie is also used to ensure relevance of the video advertisement to the specific visitor. |
| wistia-http2-push-disabled | Wistia | 1 day | Collects data on visitor interaction with the website 's video content - This data is used to make the website's video content more relevant towards the visitor. |

**8. Learn more about cookies**

To find out more about cookies in general visit [aboutcookies.org](https://www.aboutcookies.org/) or [allaboutcookies.org](https://www.allaboutcookies.org/) (which is run by IBA Europe).

A guide to behavioural advertising and online privacy has been produced by the internet advertising industry which can be found at [youronlinechoices.eu](http://www.youronlinechoices.eu/). The guide contains an explanation of the Internet Advertising Bureau's self-regulatory scheme to allow you greater control of the advertising you see.

**9. How can you contact us?**

You may contact us if you have any questions about this cookie policy: [dataprotection@intelliflo.com](mailto:dataprotection@intelliflo.com).