# To be completed with the client and uploaded by Switchboard via the secure referral link.

# We need to record information about you so that we can give you advice. This is called a ‘legitimate interest’ to store basic information about you and your situation. When we record and use your personal information we:

# only access it when we have a good reason

# only share what is necessary and relevant

# don’t sell it to commercial organisations

# Please let us know if you’d like more information about how we’ll use your information, or visit [www.citizensadvice.org.uk/myinformation](http://www.citizensadvice.org.uk/myinformation)

| **An adviser may need to contact you. Please tick if you agree that the adviser can:** | | **Can we contact you for feedback about our service? Please tick if you agree to be contacted for feedback via:** | |
| --- | --- | --- | --- |
| * Phone * Leave a voicemail | * Text * Email | * Mobile * Home phone | * Text * Email |
| **Is there anything else we need to know before we contact you?** | | | |
| **We need extra permission to hold certain information about you, called ‘special category personal data’. If you give us permission, we’ll use this information to give you advice. We’ll also use the data anonymously to improve our service and support our research.** **Please tick if you agree for us to store and use information about your:** | | | |
| * Ethnicity * Disabilities and/or health conditions | | * Religion * Sexual orientation * Trade union membership | |

| **Client name:** | |
| --- | --- |
| **Client signature:** | * **OR tick for verbal consent given** |