

Soldo General Privacy Notice

Soldo recognises the importance of protecting your personal data and is committed to handling it responsibly and transparently.

This Privacy Notice explains how Soldo collects and processes personal data when you visit the Soldo website, contact us through the communication channels available on the website or participate in our marketing, events, webinars, research or other promotional activities.

It applies to website visitors, prospective customers, business contacts and other individuals who interact with Soldo before entering into a customer relationship.

It does not apply to personal data processed in connection with employment applications, supplier relationships, SaaS services, financial services or other processing activities covered by separate privacy notices.

This Privacy Notice should also be read together with any additional privacy notices applicable to specific services or processing activities.

About us

Soldo operates through several legal entities that provide SaaS and financial services to business customers in the United Kingdom and the European Economic Area (EEA).

Soldo Software Ltd manages the Soldo website, through which you can contact us, request information about our products and services and interact with Soldo.

The activities described in this Privacy Notice may be carried out by different Soldo companies. Depending on the nature of your enquiry, the products or services you request, or the activities in which you participate, the relevant Soldo company providing those products or services will act as the controller of your personal data.

References in this Privacy Notice to "Soldo", "we", "us" or "our" mean the Soldo company acting as the controller of your personal data in relation to the relevant processing activity.

How to contact us

If you have any questions about this Privacy Notice or wish to exercise your rights under applicable data protection laws, please contact the Data Protection Officer at privacy@soldo.com.

Soldo Software Ltd

119 Marylebone Road, London NW1, United Kingdom

privacy@soldo.com

Soldo Financial Services Ireland DAC

33 Sir John Rogerson's Quay, Dublin 2, D02 XK09, Ireland

privacy@soldo.com

Soldo Financial Services Ltd

119 Marylebone Road, London NW1, United Kingdom

privacy@soldo.com

Soldo Italia Srl

Via degli Olivetani 10/12, Milan, Italy

privacy@soldo.com

What personal data we collect

We may collect personal data directly from you, automatically when you use the Soldo website or, where permitted by applicable law, from publicly available sources or business partners.

The categories of personal data we collect include, for example:

- identification and business contact information (name, business email address, telephone number, company name, job title and country);
- communications and enquiry information (information you provide when you contact us, request information about our products or services, request a demonstration, register for a webinar or otherwise communicate with us);
- marketing preferences (marketing consent records and communication preferences);
- website, technical and usage information (IP address, browser and device information, website usage information, cookie identifiers and similar technologies, where applicable);
- information obtained from publicly available sources or business partners (business contact information and other information relevant to the activities described in this Privacy Notice).

The provision of certain personal data may be necessary to respond to your enquiry, provide the information you request or enable your participation in the activities described in this Privacy Notice. Failure to provide such information may prevent us from doing so.

Cookies

We use cookies and similar technologies to operate and secure the Soldo website and, where you have provided your consent, to improve your browsing experience, understand how the website is used, measure the effectiveness of communications and marketing activities, and personalise website content where applicable.

You can change your cookie preferences at any time by clicking the cookie settings icon displayed in the bottom-left corner of each page of the Soldo website.

Further information about the cookies we use, including their purposes, retention periods and how to manage your preferences, is available in our [Cookie Policy](#).

Why we use personal data

We process personal data for the following purposes:

- a. Website operation and security
to operate and secure the Soldo website, protect it against security threats and investigate security incidents.
- b. Website performance and improvement
to monitor the performance and effectiveness of the Soldo website, understand how it is used and improve its functionality and user experience.
- c. General enquiries and product information
to respond to general enquiries, provide information about Soldo's products and services, arrange product demonstrations and deliver webinars.
- d. Marketing communications
to send marketing communications, event reminders and other information about Soldo's products and services, where permitted by applicable law.
- e. Disclosure of business contact information to commercial partners for direct marketing purposes
to share business contact information of prospective and existing customer contacts with independent commercial partners, enabling them to provide information about their own products and services.
- f. Research and marketing improvement
to carry out research and testing activities to improve marketing content, campaigns, communications, website functionality and user experience.
- g. Interactive tools

to process the information you provide through interactive tools in order to generate the requested results and help you evaluate Soldo's products and services.

h. Advertising conversion measurement and campaign optimisation

to measure the effectiveness of marketing campaigns and optimise future communications and campaigns.

i. Compliance and audits

to comply with legal and regulatory obligations, respond to requests from individuals and competent authorities, and manage internal and external audits and certification activities.

j. Legal claims

to establish, exercise or defend legal claims.

Lawful basis for processing

We rely on the following legal bases:

Contract and steps taken at your request

Processing is necessary to take steps at your request before entering into a contract or to provide the information, activities or services you have requested.

Legitimate interests

Our legitimate interests include promoting our products and services, maintaining the security, performance and effectiveness of our website and communications, developing and improving our business activities, and protecting our business, systems and legal rights. We also have a legitimate interest in developing commercial partnerships and generating business opportunities by sharing relevant business contact information with independent commercial partners for their own B2B marketing activities.

Legal obligation

Processing is also necessary to comply with applicable legal and regulatory requirements, including obligations arising under applicable laws, regulations, court orders or requests from competent authorities.

Consent

We rely on your consent where required by applicable law for marketing communications, the use of non-essential cookies and similar technologies, and the recording of research or testing sessions. We may also rely on your consent to share your business contact information with independent commercial partners for their own direct marketing purposes.

How we share personal data

Personal data may be shared with other Soldo companies where necessary to respond to your enquiries, provide the information, activities or services you request, or support the products or services in which you have expressed an interest.

Personal data may also be shared with technology, communication, marketing, analytics and other professional service providers that support our business activities. This includes providers of customer relationship management, marketing automation, lead generation and similar platforms. Some of these tools may incorporate artificial intelligence or similar technologies to support functions such as data analysis, content generation, campaign optimisation and other processing activities. These providers process personal data only on our behalf and in accordance with our instructions.

Personal data may also be shared with business partners, advertising platforms, event organisers and other organisations acting as independent controllers. This may include the exchange of business contact information in connection with marketing initiatives, events sponsored by Soldo or other commercial activities.

We may disclose personal data to professional advisers, auditors, competent authorities, courts, law enforcement agencies or other recipients where necessary to comply with legal or regulatory obligations, support audit activities, establish, exercise or defend legal claims, or where otherwise required or permitted by law.

International transfers of personal data

Where personal data is transferred outside the EEA or the United Kingdom (UK), we ensure that appropriate safeguards are in place in accordance with applicable data protection laws. These safeguards may include transfers to countries recognised as providing an adequate level of protection, the use of the European Commission's Standard Contractual Clauses (SCCs) and, where applicable, the UK International Data Transfer Addendum (UK Addendum).

We may also rely on the EU-US Data Privacy Framework or the UK Extension to the EU-US Data Privacy Framework, as applicable, for transfers to certified organisations in the United States.

How long we keep personal data

We will keep your personal data for as long as is necessary to fulfil the purposes described in this Privacy Notice.

Retention periods vary depending on the nature of the personal data and the purpose for which it is processed.

Personal data processed for marketing, promotional and related engagement activities, as well as website usage, performance and security purposes, is generally retained for up to four (4) years from the relevant interaction, activity or collection of the data, as applicable. Where a shorter period is appropriate for a specific activity or category of data, the data is deleted or anonymised earlier.

Retention periods for cookies and similar technologies are set out in our [Cookie Policy](#).

Personal data relating to general commercial enquiries from prospective customers is retained for two (2) years after the relevant enquiry ticket is closed.

Personal data may be retained for longer where necessary to establish, exercise or defend legal claims.

How we protect personal data

We take the security of personal data seriously and implement appropriate technical and organisational measures designed to protect personal data against accidental or unlawful destruction, loss, alteration, unauthorised disclosure or access.

These measures are designed to ensure a level of security appropriate to the risks associated with the processing of personal data and include measures to safeguard the confidentiality, integrity and availability of personal data.

Access to personal data is limited to individuals who have a legitimate business need to access it. We also require third parties processing personal data on our behalf to implement appropriate security measures and comply with applicable data protection requirements.

Your data protection rights

We are committed to ensuring that you can exercise your rights in relation to your personal data.

Under applicable data protection laws, you have several rights regarding the personal data we hold about you. In particular, you may have the right to:

- request access to the personal data we hold about you;
- request correction of inaccurate or incomplete personal data;
- request the erasure of your personal data in certain circumstances;
- request the restriction of processing;
- object to the processing of your personal data where we rely on our legitimate interests as the legal basis for processing;
- receive the personal data you have provided to us in a structured, commonly used and machine-readable format and transmit it to another data controller. This right applies

where the processing is carried out by automated means and is based on a contract with us or your consent.

Where you object to processing based on our legitimate interests, we will stop processing your personal data unless we can demonstrate compelling legitimate grounds for the processing which override your interests, rights and freedoms, or where the processing is necessary for the establishment, exercise or defence of legal claims. Where we rely on legitimate interests for direct marketing purposes, including sharing personal data with commercial partners for their own direct marketing activities, you have the right to object at any time. If you object, we will stop processing your personal data for those purposes.

If processing is based on your consent, you may withdraw that consent at any time. You can unsubscribe from marketing communications by using the unsubscribe link included in our emails. Consent to the use of non-essential cookies and similar technologies can be withdrawn at any time as described in the Cookies section of this Privacy Notice. Withdrawal of consent will not affect the lawfulness of processing carried out before consent was withdrawn.

We do not carry out decisions based solely on automated processing, including profiling, that produce legal effects concerning you or similarly significantly affect you.

You can lodge a complaint with the data protection authority in the country where you live or work. For example:

- United Kingdom - [Information Commissioner's Office \(ICO\)](#)
- Ireland - [Data Protection Commission \(DPC\)](#)
- Italy - [Garante per la protezione dei dati personali](#)
- Other EEA countries - [European Data Protection Board list of supervisory authorities](#)

We would, however, appreciate the opportunity to address your concerns before you approach the authority, so please contact us in the first instance.

Changes to this Privacy Notice

We may update this Privacy Notice from time to time.

Last updated: 20 October 2026 | Version 10.0