

MTE, Mortgage Trading Exchange (standalone version) & GDPR

This document details how MTE Standalone already fulfils GDPR requirements and the further enhancements that have been made in light of customer feedback and consultation.

Personal data

- MTE collects personal data from clients in order to complete a mortgage application form
- Stored data is encrypted and password protected
- Users of the system do have a legitimate reason for collecting data
- Mortgage Brain has no access to the user's data (except in specific circumstances)
- Mortgage Brain are responsible for ensuring users can meet their GDPR responsibilities

Fulfilled GDPR requirements

- Personal data is encrypted
- Personal data is also protected by the Windows security on the PC
- Users are able to delete applications permanently

Enhancements for GDPR

- Users can export client data as a CSV file
- There is a new option to record a free text note when deleting a client
- MTE Standalone will keep a record of client data exports and deletions

Adviser's responsibilities

- To ensure computers running MTE Standalone are fully secured
- To ensure MTE Standalone is only run on versions of Windows supported by Microsoft
- To ensure Windows is kept fully up to date with the latest security updates
- To create strong passwords for log on to Windows
- We recommend the use of hard disk encryption and screen savers