

MARSHBERRY – CANDIDATE GDPR PRIVACY NOTICE

Last modified on May 8, 2026

This Candidate Privacy Notice provides you, as a prospective candidate, information on our processing of personal data during the MarshBerry application process in accordance with Articles 13 and 14 GDPR. Additionally, it informs you about data subject's rights you have under GDPR and your local data protection law. "Personal data" means any information concerning an identified or identifiable individual. This includes information such as, for example, your name, address, telephone number and date of birth, but also information relating to your specific career e.g. "Processing" means any operation or set of operations that is performed on personal data or on sets of personal data, whether or not by automated means, such as collection, recording, organization, structuring, storage, adaptation or alteration, retrieval, consultation, use, disclosure by transmission, dissemination or otherwise making available, alignment or combination, restriction, erasure or destruction.

DEFINITIONS

GDPR:

- a. To the extent the UK GDPR applies, the law of the United Kingdom or of a part of the United Kingdom which relates to the protection of Personal Data.
- b. To the extent the EU GDPR applies, the law of the European Union or any member state of the European Union to which the processing is subject, which relates to the protection of Personal Data.

NAME AND CONTACT INFORMATION OF THE CONTROLLER(S)

MarshBerry is an international consulting firm with offices in the United Kingdom, Europe and the US.

The entities listed on Schedule 1 attached hereto (together with their affiliated entities and group companies, "MarshBerry" "we", "our" and "us") act as independent data controllers of personal data collected about you for the administrative, technical and operational purposes of their recruitment processes, including the connection between you and the MarshBerry entity to which you apply. For the data processing done during the review of your application and throughout the further process, the group company with which you apply for a specific position is an controller, as will the group company/ies which employ HR staff (to extent this is not the company with which you apply) involved in your particular application process.

PURPOSES OF DATA PROCESSING AND LEGAL BASIS

If you apply for a position via e-mail or using our online form in the recruitment site or using a dedicated recruitment platform (for example, LinkedIn), we will collect and process personal data transmitted by you through the application channel chosen by you for the purpose of executing the application process, examining your application and, if applicable, contacting you in case of questions, for inviting you to participate in a next round of the application process and for preparing relevant contract. The legal basis for this purpose of data processing is to take steps prior to entering into a contract (Art. 6 (1) b GDPR).

We additionally have a legitimate interest in managing and evaluating your application and information provided as a result of and throughout your application process. In this respect, we have a legitimate interest to use information about you for improving our application process. The legal basis for this purpose of data processing is the legitimate interest of MarshBerry to improve its application process and the job applicants experience (Art. 6 (1) f GDPR). If you decide to provide us with additional optional data because you wish us to consider it for the applicant process, we process such data based on our legitimate interests to use data provided voluntarily for the application process (Art. 6 (1) f GDPR). The Internet or other electronic network activity information about you automatically collected through the application channel used by you is processed based on our legitimate interests in collecting the

technical data necessary to provide you the opportunity to use the application channel.

We also have a legitimate interest to use information about you necessary to exercise and defend our rights and claims, where this becomes relevant. The legal basis for this purpose of data processing is the legitimate interest of MarshBerry in defending its rights and interests (Art. 6 (1) f GDPR).

When data processing is obligatory for us to comply with applicable laws and, (except as otherwise provided or permitted by applicable law, with exclusive reference to the selection of persons belonging to the protected categories) when data processing is necessary to fulfill our legal obligations or allow you to exercise the rights provided by applicable law and collective agreements in the field of labor law, social security and social welfare protection, we process information about you on the legal basis of legal obligations to which MarshBerry is subject (Art. 6 (1) c GDPR in conjunction with the respective provision regulating our obligation). For example, we are obligated to process certain data in certain jurisdictions under their local labor/employment laws. In case we need to process special categories of personal data relating to you for the aforementioned purposes or to exercise our rights under employment, social security, and social protection law, it will be done based on Art. 9 (2) b GDPR and the relevant national employment and social security and social protection law.

If you provide us references and agree, we may reach out to the people you provided as reference to verify the reference, and its content based on our legitimate interests in using reference information provided by you for the application process and verifying such information (Art. 6 (1) f GDPR). In case one of our colleagues or business partners referred you to us, we first obtain data relating to you from them based on our legitimate interests in using data relating to you which we have received as part of the reference made (Art. 6 (1) f GDPR). In certain cases, we work together with headhunters or agencies to fill vacancies. They collect your personal data - unless we inform you otherwise - as separate controllers within the meaning of Art. 4 No. 8 GDPR and pass it on to us. We use the data received from headhunters or agencies to carry out the further application process on the basis of our legitimate interests in using the data received from headhunters or agencies (Art. 6 (1) f GDPR). If we consider publicly available data in individual cases as part of your application, we process this information based on our legitimate interests in the use of publicly available information relevant in individual cases (Art. 6 (1) f GDPR).

In some cases, we may ask you to conduct a video call with us. If we send you an invitation to such a call and during the actual call, data relating to you will also be processed. In these cases, the processing is based on our legitimate interests in the use of the data necessary to send you an invitation and in the processing of the data necessary to carry out the actual video call with you (Art. 6 (1) f GDPR).

Within our company group, we share HR resources and support each other in this area. We also share data on potential candidates and applicants in the company group to check which company in the group you could work for in the future. This data processing is carried out on the basis of our legitimate interests in sharing resources, mutual support and checking which company you could work for (Art. 6 (1) f GDPR).

If you choose to become a member of our talent pool in order to receive information about future vacancies within MarshBerry that might interest you, we store your information from the application process on the basis of your freely given consent (Art. 6 (1) a GDPR). At any time, you have the right to withdraw your consent with effect for the future by contacting us and informing us of your wish to revoke your consent.

PROCESSED PERSONAL DATA

What exact data is processed during your application process, to a large extent, depends on what information you choose to transmit to us and which channel you use for your application. As a standard and general rule, the following data is collected when you apply for a position:

- First and last names
- Location
- E-mail address

- Phone number
- Channel through which you found us
- Date and time of your application
- Professional data (e.g. your current company and position, availabilities, diploma, professional experiences, etc.)
- Account information related to your account on a recruiting platform
- Internet or other electronic network activity information (e.g. IP address, device information, timestamp etc.)
- Further relevant information you provide us with your application

Furthermore, you can choose to upload or send to us additional documents, such as a cover letter, your CV and reference letters, certificates or other documents, which you would like us to consider during the application process. These documents contain additional personal data that you choose to transmit to us. You can also choose to share your LinkedIn profile with us.

The provision of such data may be necessary or optional. Mandatory data will be marked as such at the moment of collection of your personal data. If you refuse to provide mandatory data, we may not be able to process your job application.

If you use our online channel during your application process (e.g. the recruitment site), such channel may also automatically collect Internet or other electronic network activity information about you (e.g. date and time of your visit, the website from which you are reaching us, your IP address, etc.). This may include the use of cookies and other trackers, while non-essential cookies and trackers will only be used with your prior consent. We also process personal data on how you use our application website, and your device used and your Internet or other electronic network activity information to separate humans from machines filling out the application form and to ensure appropriate security. If we conduct a video call with you, we will use your name and email address to send you the invitation for the video call. We also process the data required to carry out the call with the video call service used in each individual case. Where relevant and appropriate, we may also use information about you which is publicly available (the exact data processed depends on what information relevant for the application is publicly available on you).

In case you provide us a contact for reference or in case you are referred to by someone, we will process reference information to verify your reference and to use this information for the application process. In case we receive data on you from a headhunter or agent, we process the data received in the individual case for the application process and related steps. Furthermore, we share your data relating to your application within the company group.

We generally do not collect or process data referring to the special categories of personal data under Art. 9 (1) GDPR or personal data relating to criminal convictions and offenses. We may collect health data in order to provide reasonable adjustments in compliance with employment and equality laws. . Where required by financial sector regulations, we conduct background checks which include criminal record data. In all other cases, any data falling under the special categories of personal data referred to in Art. 9 (1) GDPR and personal data relating to criminal convictions and offenses that you voluntarily communicate to us will be deleted immediately and not processed further.

SOURCES OF DATA

In most cases, we collect your personal data used for the application process from you directly. Where appropriate and relevant, we may also process publicly available information. In case you provide us a contact for reference, we obtain reference-related data from the people which you have provided as a reference. In case you are referred to us by one of our colleagues or business partners, we obtain data part of the reference made from our colleagues or business partners. In case we receive data on you from a headhunter or agent, the respective headhunter or agent is the source of such data.

DISCLOSURE OF DATA TO THIRD PARTIES

For the management of this recruitment site and your application process, your personal data can be

transmitted to the following recipients:

- The MarshBerry entity to which you apply for the management of your application;
- The other MarshBerry entities for the global management of the recruitment process within MarshBerry firm, involving in particular a global recruitment portal;
- Where relevant, the respective headhunter or agent which is involved in your particular application or a person who you provided as a reference;
- Other service providers used by MarshBerry (e.g., hosting provider, providers of video conference tools, IT tools suppliers, IT service providers, etc.) exclusively for administrative, operational and technical reason related to this recruitment site and the application process;
- Administrative or judiciary authorities but exclusively to comply with legal and/or regulatory obligations or in the cases of an express and justified request or in case of an alleged violation of legal or regulatory provisions;
- Lawyers and all interested parties but exclusively in the case of the management of possible disputes and other legal matters where appropriate;
- Other third parties following or during a restructuring, reconstitution, acquisition, debt financing, merger, sale of assets of MarshBerry or a similar transaction, as well as in case of insolvency, bankruptcy or receivership where personal data are transferred to one or more third parties as assets of MarshBerry.
- Moreover, your data may be made accessible to or communicated to our employees or collaborators, duly appointed as persons authorized to the processing, for the purposes described above.

You may reach out to the Data Protection Officer to request the exact names of recipients of your personal data.

PERSONAL DATA TRANSFER

To the extent possible, your personal data is processed within the UK and European Economic Area (EEA). However, some of our service providers are located outside the UK and EEA, and as a result, your personal data may be processed in third party countries.

When your personal data is transferred outside the UK or the EEA, Lincoln implements appropriate safeguards in accordance with the GDPR and your local data protection law (e.g. appropriate standard contractual clauses) in absence of an adequacy decision and after having carried out an assessment of the level of protection of your rights in such third party country. A copy of the implemented safeguards can be obtained by sending an email directly to the Data Protection Officer.

Name of the Recipient	Additional Country	Adopted Safeguards
Marsh, Berry & Co. LLC	USA	EU Standard Contractual Clauses UK Standard Contractual Clauses Swiss Addendum

Beyond the above recipient(s), and depending on the location of the Lincoln International company to which you apply, your personal data can also be transferred to an additional country based on appropriate safeguards.

RETENTION

As a general rule, we retain personal data for as long as it is necessary for a purpose that we process data for and for as long as we are obligated to retain data in accordance with the applicable law.

If you become an employee, we will store your application information within your future employee file during the retention periods applicable to MarshBerry's employees. If data processing is based on a legal obligation that we are subject to (Art. 6 (1) c GDPR), data is retained for as long as it is necessary

to fulfill our legal obligation. For example, we are subject to retention periods foreseen in labor/employment laws or in other applicable laws to which the controller is subject. In case we retain personal data based on our legitimate interests, we will store such personal data until your interests in the deletion override our interests in retaining the personal data.

If you choose to become a member of our talent pool, we will store information from your application process for 2 years, unless you decide to withdraw your consent earlier.

If your application was unfortunately not successful and you do not become a member of our talent pool, we will delete information from your application process as long as you may take legal action against the denial (the timeframe depends on national laws applicable) so that you can obtain explanations of the reasons that led to this decision and we are able to defend our rights and interests, unless we have a legal obligation to retain personal data for a longer period. For example, in the UK, the standard retention period is 90 days. In Germany and Italy, the relevant period is 6 months.

You may request the exact period applicable for your particular application by sending an email to the Data Protection Officer.

Beyond these retention periods, your personal data can be kept during the applicable statute of limitation for evidence purposes where relevant.

YOUR RIGHTS

If you are based in the EU/EEA/UK, you have the following rights over your personal data:

Your Rights	Scope of Your Rights
Right to Access (art. 15 GDPR)	You have the right to request: <ul style="list-style-type: none"> ● the confirmation on whether MarshBerry processes your personal data or not; ● a copy of such personal data; and ● information on the use of your personal data by MarshBerry in a clear, transparent and understandable way (as provided in this Privacy Policy).
Right to Rectification (art. 16 GDPR)	You have the right to request the rectification of your personal data, in order to obtain the modification of your personal data if your personal data is obsolete, inaccurate or incomplete.
Right to delete (art. 17 GDPR)	You have the right to request the deletion of your personal data (or right to be forgotten), when one of the following conditions applies: <ul style="list-style-type: none"> ● you object to the processing of your personal data and there are no overriding legitimate reasons justifying to maintain the processing of your personal data (e.g. legal obligation involving the retention of your personal data); ● you decide to withdraw your consent on which the processing is based and we do not base the processing on an alternative legal basis; ● your personal data are no longer useful for the original purposes for which it was collected or for any other type of processing; ● the use that is made of your data does not comply with the applicable legal or regulatory provisions.



Your Rights	Scope of Your Rights
Right to Restriction of Processing (art. 18 GDPR)	<p>You have the right to request the restriction of the processing during a limited period of time, in particular in order to carry out some verifications, where one of the following conditions applies:</p> <ul style="list-style-type: none">• you contest the accuracy of your personal data, the processing of which is thus restricted for the period necessary for MarshBerry to verify the accuracy of such personal data;• the processing is unlawful and, rather than requesting their deletion, you prefer to restrict their use;• MarshBerry no longer needs your personal data for the purposes of the processing, but you need them for the establishment, exercise or defense of legal claims;• you have objected to the processing, which is thus restricted pending the verification of whether the compelling legitimate grounds of MarshBerry may override your interests, rights and freedoms.
Right to Data Portability (art. 20 GDPR)	<p>You have the right to request a copy of your personal data that you have provided to MarshBerry in a structured, commonly used and machine-readable format and also can request their transmission to another data controller where technically feasible. This right is not exercised in all circumstances, it applies only if it fulfils all the following conditions:</p> <ul style="list-style-type: none">• your request is only related to your personal data (excluding anonymous or third-party data);• your request does not adversely affect the rights or freedoms of others, in particular those of MarshBerry (including trade secrets or intellectual property);• the processing is carried out by automated means (paper files are therefore not included);• the processing is based on consent or the performance of a contract.
Right to Object (art. 21 GDPR)	<p>You have the right to object to our processing of your personal data at any time if the processing is based on our legitimate interest. MarshBerry will no longer process your personal data, unless they demonstrate compelling legitimate grounds for the processing which override your interests, rights and freedoms, such as the respect of a legal obligation (e.g. legal obligation involving the retention of personal data), or for the establishment, exercise or defense of legal claims.</p>
Right to Withdraw Your Consent (art. 7 GDPR)	<p>You have the right to withdraw your consent when it has been obtained, without this withdrawal affecting the lawfulness of the personal data processing operations previously carried out.</p>

It is specified that the exercise of these rights is based on the legal basis of the processing, as follows:

	Access	Rectification	Erasure	Restriction	Data portability	Objection
Consent	Yes	Yes	Yes	Yes	Yes	Withdrawal of consent
Steps prior to entering into a contract			Yes		No	
Contract			Yes		No	
Legitimate interest			Yes		Yes	
Legal obligation			No		No	

In addition to the above-mentioned rights, you may lodge a complaint with a data protection supervisory authority.

Depending on your country of residence, you may have additional local rights with respect to our processing of your personal data, or your rights may be limited under specific circumstances provided by national and local laws. You may revoke your instructions at any time.

Under certain circumstances, MarshBerry may ask you for specific information in order to confirm your identity and ensure the exercise of your rights. This is another appropriate security measure to ensure that personal data is not disclosed to an individual who does not have the right to receive it.

In case you make use of your rights indicated above, we will process your personal data relating to your requests under applicable data protection laws and will retain data you provide and data we use to fulfill your request in line with the statutory limitation period under applicable data protection law. We rely on our legitimate interests in defending our legal rights and interests (Art. 6 (1) f GDPR) as our lawful basis with respect to this processing.

DATA PROTECTION OFFICER CONTACT INFORMATION:

Please contact the MarshBerry Data Protection Officer (DPO) at dataprotectionofficer@lincolninternational.com if you have any questions about this Privacy Notice, or would like to exercise any of your rights regarding personal data we hold relating to you or to request a restriction of the use of your personal data.

HOW TO FILE A CLAIM

If the respective DPO is unable to resolve any query or concern you raise, please contact the following regulatory authorities to receive information about your rights and how to make a formal complaint based on your jurisdiction which is determined by the location of the MarshBerry Group Company to which you have applied:

- Germany: Hessischer Beauftragter für Datenschutz und Informationsfreiheit at <https://datenschutz.hessen.de/service/beschwerde-uebermitteln> or telephone: 0611 1408 0.
- Netherlands: Autoriteit Persoonsgegevens at <https://www.autoriteitpersoonsgegevens.nl/een-tip-of-klacht-indienen-bij-de-ap> or telephone: 088 1805 250.
- UK: UK Information Commissioner at ico.org.uk/concerns/ or telephone: 0303 123 1113.

LEGAL DISCLOSURES:

We reserve the right to adjust this information on processing of personal data during the application process at any point in time to ensure that it is in line with the current legal requirements at all times, or in order to accommodate changes in the application process or other processes. In this case, the new

data privacy statement applies to any later visit of this recruitment website or any later job application. Please visit our Privacy Policy and Disclosures page for more information on our data protection policies: <https://www.marshberry.com/privacy-policy/>

Schedule I – MarshBerry Entities Acting as Data Controllers

MarshBerry International Cooperatief U.A.

De Lairesestraat 137-143
1075 HJ Amsterdam
The Netherlands
Email: NLinfo@MarshBerry.com
Phone: +31 20 218 7800

IMAS Corporate Finance LLP

10 Philpot Lane
London, EC3M 8AA
United Kingdom
Email: UKinfo@MarshBerry.com
Phone: +44 20 7444 4399

MarshBerry UK Holding Limited

10 Philpot Lane
London, EC3M 8AA
United Kingdom
Email: UKinfo@MarshBerry.com
Phone: +44 20 7444 4399

Marsh, Berry & Company, LLC

28601 Chagrin Blvd, Suite 400
Woodmere, OH 44122
Email: compliance@MarshBerry.com
Phone: (440) 354-3230