Chevron UK Pension Plan and the Chevron UK Expected Life Scheme
Data Privacy Statement

Data protection privacy notice – how we use your personal data

Who we are

Ross Trustees Services Limited (trading as Independent Governance Group) is the trustee ("the Trustee") of the Chevron UK Pension Plan (the "Plan") and the Chevron UK Expected Life Scheme (the "Scheme").

As the Trustee of the Plan and the Scheme, we hold certain personal information (known as "personal data") about Plan and Scheme members and, where applicable, their dependants and beneficiaries. Most of the personal data held and processed by the Trustee in running the Plan and the Scheme will be personal data (in other words, it is information from which you as an individual can be identified).

For legal purposes, the Trustee is known as the "data controller" of each arrangement, as we decide the purposes for and the means by which the personal data we hold is processed.

In certain circumstances, the Plan's and the Scheme's professional advisers may also be data controllers, such as the Plan Actuary and Willis Towers Watson, who have provided further details which may be found at www.willistowerswatson.com/personal-data. Our legal advisers, Sacker & Partners LLP are also data controllers in relation to your personal data (in certain circumstances) – see their privacy notice for pension scheme members, beneficiaries and client's employees.

What information we collect about you

Depending on the circumstances and the stage of your membership, we may hold some or all of the following information about you:

- your name, date of birth, gender and marital status
- your address and other contact details
- your national insurance number
- details about your pension benefits
- details about your remuneration and employment, including your current and previous salary information, employment dates and details of your working hours
- details of your bank account (to pay benefits)
- details about your dependants and/or beneficiaries and your marital status, including their names, gender, relationship to you and dependency criteria (where provided)
- medical and other details about your health
- if you have used a pensions dashboard, an online platform where you can access information about all of your pension benefits, a "pensions identifier", which is a string of characters used to identify your specific benefits under the Plan.

In order to properly administer the Plan and the Scheme and to calculate and pay benefits, from time to time we may also need to hold other information about you and your dependants and/or beneficiaries.

How we gather and store your personal information

Your personal data will generally be collected directly from you or from your employer. However, we may also receive personal data from other parties such as HM Revenue & Customs, the Pensions Ombudsman or someone acting on your behalf, such as an independent financial adviser. If you are receiving a dependant's benefit from the Plan, or a benefit resulting from divorce or the dissolution of a civil partnership, we may have been given your personal data by the member or through enquiries undertaken by us on a member's death.

Personal data is held on computer systems and on paper (in relation to the Plan only).

How and why we use that information

We need to use your personal information to manage your pension scheme membership and calculate and pay benefits from the Plan and the Scheme.

Most of the processing we do is to ensure that we comply with our obligations under the Plan and the Scheme's governing documents, as well as under relevant legislation, including to comply with our duties in relation to individuals using pensions dashboards. This includes "matching", where we use personal data that a user has provided to search our Plan records to check whether that user is a member of the Plan, and where we collect further personal data from that user in the event of a "possible match". In other cases, the Trustee of each arrangement has a legitimate interest in holding and processing the above information as it is needed for us to properly administer the Plan and the Scheme and to calculate and pay benefits.

As part of running the Plan and the Scheme, we may also need to hold and process sensitive information about you and/or your dependants and beneficiaries (known as "special categories of personal data"). Under data protection legislation, details relating to health, racial or ethnic origin, religious or other similar beliefs, sexual orientation and political affiliations are regarded as "special categories of personal data". Except where the legislation allows it, this information cannot be processed or passed to a third party without your explicit consent. The Trustee may need to process this type of data, for example, when considering any ill-health cases or distribution of benefits on your death. The Trustee may process special categories of personal data that may be included on an expression of wish form when considering who any death benefits should be paid out to.

We are supported by relevant teams from within the Chevron Group to help with the smooth running of the Plan and the Scheme. Your personal information may, therefore, be stored and processed in the US or any other country in which Chevron or its subsidiaries, affiliates or joint ventures maintain facilities. As part of the Chevron group of companies, the Trustee has appropriate safeguards in place to ensure your data is kept secure when it is transferred outside the UK. Such transfers will generally be made relying on UK adequacy regulations. Alternatively, they may be made using the UK's International Data Transfer Agreement or, where relevant, using the UK Addendum to the European Commission's standard contractual clauses, and where we consider that the protection for the data subject's personal data would not be "materially lower" after the transfer. You can find copies of the Agreement and Addendum here. You can request details of these safeguards (see "Who to contact" below).

Who we share it with

As the Trustee needs help from various advisers to properly administer the Plan and the Scheme, we may share personal data with the following:

- relevant Chevron teams, which provide support to the Trustee and enable the Plan and the Scheme to operate smoothly and effectively
- your current, past or future employer or other companies within the Chevron group, which may include group companies which are based outside the UK (where data is sent outside the UK, appropriate safeguards are put in place to ensure that your data is kept secure)
- the third parties who provide services to Chevron relating to the sponsorship of the Plan and the Scheme, including Willis Towers Watson, who provide actuarial services to the Chevron to assist

with assessing and providing financial support to the Plan (to ensure potential conflicts of interest are managed appropriately, separate teams at Willis Towers Watson support the Trustee and Chevron) and Chevron's auditor, who assist Chevron in complying with its legal responsibilities relating to its sponsorship of the Plan and the Scheme.

- the third parties who are responsible for the day-to-day administration of the Plan and the Scheme on behalf of the Trustee, Barnett Waddingham and Fidelity International
- the Plan's and the Scheme's professional advisers, including:
  - the Plan Actuary, Colin Smith of Willis Towers Watson
  - the Plan's actuarial advisers, Willis Towers Watson and the Plan's investment advisers, Mercer Limited
  - the Plan's auditor, PWC
  - the Plan's covenant adviser, Interpath Advisory Ltd
  - the Plan's and the Scheme's legal adviser, Sacker & Partners LLP
- Chevron Health & Medical Group and other occupational health and medical advisers, who provide support to the Trustee when it considers ill-health benefits from the Plan
- KPMG, the Plan's payroll provider
- HM Revenue & Customs and other statutory bodies (such as the Pensions Ombudsman and the Pensions Regulator) – the Trustee can be fined and subject to other action if it fails to provide certain information to these authorities
- third parties that form part of the "dashboard ecosystem" that enables pensions dashboards services to work, as well as the Plan's Integrated Service Provider (ISP), which provides a service allowing pensions information from the Plan to be connected to the dashboard ecosystem
- companies for the purposes of trustee insurance, life insurance and additional voluntary contributions
- depending upon how the Trustee pays Plan pensions or Scheme benefits, the personal data we have to supply in order to effect a BACS transfer (the Bankers' Automated Clearing Service) or CHAPS (the Clearing House Automated Payment System) in the UK and/or a payment via the administrators' banking providers when pensions/lump sums are being paid overseas
- tracing agencies who assist the Trustee with updating Plan data from time to time

We may also disclose your personal data to other third parties, for example in the event that we consider undertaking a bulk transfer, or wish to enter a buy-in/buy-out of any of the benefits under the Scheme, in which case we may disclose your personal data to the prospective counterparty to such a transaction.

How long we keep personal data for

We must keep all personal data safe and only hold it for as long as necessary. To meet the requirements of both UK tax and pensions law, we must keep certain personal data (for example, details about the date a member joins the Plan, their name and address, and details of benefits paid) for a minimum of 6 years. Where there is a maximum limit on how long we can keep certain personal data for, such as in relation to pensions dashboards, we will comply with that restriction. But, given the long-term nature of pension schemes, the Trustee may be required to keep some of your personal information for the rest of your life and for an appropriate period after that to reflect the potential for pension queries and complaints.

However, we review the personal data held in relation to the Plan and the Scheme on a regular basis in accordance with our data retention schedule. If we conclude that certain personal data is no longer needed, that personal data will generally be destroyed.

Your rights in respect of your data held in respect of the Plan and the Scheme

- You have the right to see personal data that is held about you and a right to have a copy provided to you, or someone else on your behalf, in a machine readable (namely, digital) format
- If at any point you believe that the personal data we hold about you is inaccurate or wrong, you can ask to have it corrected
- You can require the Trustee to limit the processing of your personal data in certain circumstances, for example, whilst a complaint about its accuracy is being resolved
- You can object to your personal data being processed where we are relying on have a legitimate interest to use it, although the Trustee can override this objection in specific instances
- Where you have given us your consent to processing your personal data, you can withdraw that consent at any time by notifying us (see "Who to contact" below). However, withdrawing your consent will not affect how we used any of your personal data beforehand and it may be possible for us to continue to use it where we can justify continued use
- You can request that your personal data is deleted altogether, although the Trustee can override this objection in specific instances
- You have the right to complain to the Information Commissioner's Office, or to bring an action before the court, if your personal data rights are not complied with (see "Making a complaint to the Information Commissioner's Office" below

You should be aware that taking some of the above steps could impact on the payment of your benefits and/or your participation in the Plan and the Scheme, and/or our ability to answer questions relating to your benefits.

Information will generally be provided to you free of charge, although the Trustee can charge a reasonable fee in certain circumstances.

Who to contact

If you wish to:

- see your personal data or to exercise any of the rights mentioned above
- details of safeguards for when data is shared outside the UK
- request a hard copy of this notice

please contact the Plan administration team by calling 0344 264 3587 or by emailing chevron@barnett-waddingham.co.uk. If your query relates only to the Scheme, please contact Chevron via totalrewardseur@chevron.com or you may also contact Chevron's Pensions Manager, Ashley Sanders via sandeaj@chevron.com.

Making a complaint

If you believe we are processing your personal data in a way which is inconsistent with the law, you can complain to us by filling in the Complaints Form found at the end of the Internal Dispute Resolution Procedure and Data Complaints Procedure document chevron-IDRP-and-data-complaint-policy.pdf and submitting it to the Trustee at:

The Trustee of the Chevron UK Pension Plan
c/o Ashley Sanders,
Chevron Energy Limited,
1 Westferry Circus,
Canary Wharf,
London, E14 4HA

If you are not satisfied with our response to your complaint, you can complain to the Information Commissioner's Office whose helpline number is: **0303 123 1113.**

Updates to this statement

This statement is the latest version as at August 2026. This notice will be updated from time to time, for example, to reflect changes to the Plan and the Scheme's personal data flows and data protection law and guidance from the Information Commissioner's Office. You can access the current version at any time on this webpage or by request (see "Who to contact" above).

As at August 2026