

# PRIVACY NOTICE

## 1. PURPOSE OF THIS NOTICE

This notice describes how we collect and use personal data about you, in accordance with the General Data Protection Regulation (GDPR), the Data Protection Act (1998 or 2018) and any other national implementing laws, regulations and secondary legislation, as amended or updated from time to time, in the UK ('Data Protection Legislation').

Please read the following carefully to understand our practices regarding your personal data and how we will treat it.

## 2. ABOUT US

Boardman & Co is an accountancy and tax advisory firm owned and managed by Mrs Susan Boardman FCA, as a sole practitioner.

For the purpose of the Data Protection Legislation and this notice, we are the 'data controller'. This means that we are responsible for deciding how we hold and use personal data about you. We are required under the Data Protection Legislation to notify you of the information contained in this privacy notice.

In respect of the payrolls we prepare, we are the 'data processor' the employer being the 'data controller'.

Our 'Data Protection Point of Contact' is Susan Boardman, who is responsible for assisting with enquiries in relation to this privacy notice or our treatment of your personal data. Should you wish to contact her you can do so using the contact details noted at paragraph 12, below.

Boardman & Co takes the protection of your privacy very seriously. We will only use your personal information to deliver the services you have requested from us, and to meet our legal responsibilities.

## 3. HOW WE MAY COLLECT YOUR PERSONAL DATA

We obtain information about you when you engage us to act as accountants, tax advisors or for other similar professional services and/or when you use our website, for example, when you contact us about our services.

We collect information when:

- you, your accountant, or an accountant seeking to act for you request a proposal from us in respect of the services we provide;
- you or your employer or our clients engages us to provide our services and also during the provision of those services;
- your or your representative provide bank details, pension details, or day to day accounting information to enable us to undertake the services requested;
- required from third parties and/or publicly available resources (for example, from your employer or from Credit Reference Agencies or Companies House.
- from third parties and/or publicly available resources (for example, from your employer,

your stock-broker or from Companies House).

- you contact us by email, telephone or post, for example when you have a query about our services; or
- you meet a Boardman & Co employee at an event.

#### 4. THE KIND OF INFORMATION WE HOLD ABOUT YOU

The personal information we hold about you will vary depending on the service we provide.

The information we hold about you may include the following:

- your personal details (such as your name, address, telephone number, email address, date of birth, marital status, your passport/ID card number, your Unique Tax Reference (UTR) number, your National Insurance number, your IP address, tax codes, salary and pension income, investment information, bank account details,);
- salary information, tax code, employment contract details
- details of contact we have had with you in relation to the provision, or the proposed provision, of our services;
- details of any services you have received from us;
- our correspondence and communications with you;
- information about any complaints and enquiries you make to us;
- information from research, surveys, and marketing activities;
- Information we receive from other sources, such as publicly available information, information provided by your stock-broker, your employer, our clients or other advisor.

#### 5. HOW WE USE PERSONAL DATA WE HOLD ABOUT YOU

We may process your personal data for purposes necessary for the performance of our contract with you or your employer or our clients and to comply with our legal obligations.

We may process your personal data for the purposes necessary for the performance of our contract with our clients. This may include processing your personal data where you are an employee, subcontractor, supplier or customer of our client.

We may process your personal data for the purposes of our own legitimate interests provided that those interests do not override any of your own interests, rights and freedoms which require the protection of personal data. This includes processing for marketing, business development, statistical and management purposes.

We may process your personal data for certain additional purposes with your consent, and in these limited circumstances where your consent is required for the processing of your personal data then you have the right to withdraw your consent to processing for such specific purposes.

Please note that we may process your personal data for more than one lawful basis depending on the specific purpose for which we are using your data.

##### **Situations in which we will use your personal data**

We may use your personal data in order to:

- carry out our obligations arising from any agreements entered into between you or your employer or our clients and us (which will most usually be for the provision of our services);

- carry out our obligations arising from any agreements entered into between our clients and us (which will most usually be for the provision of our services) where you may be a subcontractor, supplier or customer of our client;
- verify your identity where this is required;
- understand your needs and how they may be met;
- maintain our records in accordance with applicable legal and regulatory obligations;
- prevent and detect crime, fraud or corruption;
- contact you by post, email or telephone;
- provide you with information related to our services and our events and activities that you request from us or which we feel may interest you, provided you have consented to be contacted for such purposes;
- seek your thoughts and opinions on the services we provide; and
- notify you about any changes to our services.

In some circumstances we may anonymise or pseudonymise the personal data so that it can no longer be associated with you, in which case we may use it without further notice to you.

If you refuse to provide us with certain information when requested, we may not be able to perform the contract we have entered into with you. Alternatively, we may be unable to comply with our legal or regulatory obligations.

We may also process your personal data without your knowledge or consent, in accordance with this notice, where we are legally required or permitted to do so.

### **Data retention**

We will only retain your personal data for as long as is necessary to fulfil the purposes for which it is collected.

When assessing what retention period is appropriate for your personal data, we take into consideration:

- the requirements of our business and the services provided;
- any statutory or legal obligations;
- the purposes for which we originally collected the personal data;
- the lawful grounds on which we based our processing;
- the types of personal data we have collected;
- the amount and categories of your personal data; and
- whether the purpose of the processing could reasonably be fulfilled by other means.

Our Data Retention Policy can be viewed on our website

### **Change of purpose**

Where we need to use your personal data for a reason other than for the purpose for which we collected it, we will use your personal data only where that reason is compatible with the original purpose.

Should it be necessary to use your personal data for a new purpose, we will notify you and communicate the legal basis which allows us to do so before starting any new processing.

## **6. DATA SHARING**

Any staff with access to your information have a duty of confidentiality under the ethical standards that this firm is required to follow.

### **Why we might share your personal data with third parties**

We will share your personal data with third parties where we are required by law, where it is necessary to administer the relationship between us or where we have another legitimate interest in doing so.

### **Which third-party service providers process your personal data**

“Third parties” includes third-party service providers. The following activities are carried out by third-party service providers: IT and cloud services for tax and accounting software, and banking services..

All of our third-party service providers are required to take commercially reasonable and appropriate security measures to protect your personal data. We only permit our third-party service providers to process your personal data for specified purposes and in accordance with our instructions.

### **What about other third parties**

We may need to share your personal data with other third parties, for example with a regulator or to otherwise comply with the law.

## **7. TRANSFERRING PERSONAL DATA OUTSIDE THE EUROPEAN ECONOMIC AREA (EEA)**

We may transfer personal data to reputable third-party organisations situated inside or outside the European Economic Area (EEA) when we have a business reason to engage these organisations.

Each organization is required to safeguard personal data in accordance with our contractual obligations and data protection legislation.

If you require further information about these protective measures please contact us using the contact details below.

## **8. DATA SECURITY**

We have in place commercially reasonable and appropriate security measures to prevent your personal data from being accidentally lost, used or accessed in an unauthorised way, altered or disclosed.

In addition, we limit access to your personal data to those employees, agents, contractors and other third parties who have a business need to know.

They will only process your personal data on our instructions and they are subject to a duty of confidentiality.

We have put in place procedures to deal with any suspected data security breach and will notify you and any applicable regulator of a suspected breach where we are legally required to do so.

## **9. RIGHTS OF ACCESS, CORRECTION, ERASURE, AND RESTRICTION**

### **Your duty to inform us of changes**

It is important that the personal data we hold about you is accurate and current.

Should your personal information change, please notify us of any changes of which we need to be made aware by contacting us, using the contact details below.

## **Your rights in connection with personal data**

Under certain circumstances, by law you have the right to:

- Request access to your personal data. This enables you to receive details of the personal data we hold about you and to check that we are processing it lawfully.
- Request correction of the personal data that we hold about you.
- Request erasure of your personal data. This enables you to ask us to delete or remove personal data where there is no good reason for us continuing to process it. You also have the right to ask us to delete or remove your personal data where you have exercised your right to object to processing (see below).
- Object to processing of your personal data where we are relying on a legitimate interest (or those of a third party) and there is something about your particular situation which makes you want to object to processing on this basis. You also have the right to object were we to process your personal information for direct marketing purposes.
- Request the restriction of processing of your personal data. This enables you to ask us to suspend the processing of personal data about you, for example if you want us to establish its accuracy or the reason for processing it.
- Request the transfer of your personal data to you or another data controller if the processing is based on consent, carried out by automated means and this is technically feasible.

If you want to exercise any of the above rights, please email our data protection point of contact, Susan Boardman.

You will not have to pay a fee to access your personal data (or to exercise any of the other rights). However, we may charge a reasonable fee if your request for access is clearly unfounded or excessive. Alternatively, we may refuse to comply with the request in such circumstances.

We may need to request specific information from you to help us confirm your identity and ensure your right to access the information (or to exercise any of your other rights). This is another appropriate security measure to ensure that personal information is not disclosed to any person who has no right to receive it.

## **10. RIGHT TO WITHDRAW CONSENT**

In the limited circumstances where you may have provided your consent to the collection, processing and transfer of your personal data for a specific purpose (for example, in relation to us receiving information directly from your stock-broker), you have the right to withdraw your consent for that specific processing at any time. To withdraw your consent, please email our data protection point of contact , Susan Boardman.

Once we have received notification that you have withdrawn your consent, we will no longer process your personal information (personal data) for the purpose or purposes you originally agreed to, unless we have another legitimate basis for doing so in law.

## **11. CHANGES TO THIS NOTICE**

Our Terms of Business and our policies are reviewed annually in September and additionally should circumstances require.

Any changes we may make to our privacy notice will be available to you on our website at: [www.boardman-co.eu](http://www.boardman-co.eu)

This privacy notice was last updated in May 2018

## 12. CONTACT US

If you have any questions regarding this notice or if you would like to speak to us about the manner in which we process your personal data, please email Susan Boardman, our Data Protection Point of Contact, on [susan@boardman-co.eu](mailto:susan@boardman-co.eu) or by telephone 01438 714504.

You also have the right to make a complaint to the Information Commissioner's Office (ICO), the UK supervisory authority for data protection issues, at any time.

The ICO's contact details are as follows:

Information Commissioner's Office

Wycliffe House

Water Lane

Wilmslow

Cheshire

SK9 5AF

Telephone - 0303 123 1113 (local rate) or 01625 545 745

Website - <https://ico.org.uk/concerns>

BOARDMAN & Co

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