

OK WALLACE ACCOUNTANCY AND BOOKKEEPING

GDPR PRIVACY NOTICE

OK Wallace Accountancy and Bookkeeping understands that the information you trust us with is important to you and we are committed to protecting and respecting your privacy.

This policy explains how, when and why we collect your personal information during the course of providing services to you, under what circumstances we may disclose your personal information to others and how we keep it secure.

What information do we collect about you and how?

You agree that we are entitled to obtain, use and process the information you provide to us to enable us to provide our Services (as defined in our Letter of Engagement)and for other related purposes including:-

- Updating and enhancing client records
- Analysis for management purposes
- Statutory returns
- Legal and regulatory compliance
- Crime prevention.

How will we use the information about you and why?

OK Wallace Accountancy and Bookkeeping takes your privacy seriously and will only use your personal information to provide the Services you have requested from us. We will only use this information subject to your instructions, data protection law and our duty of confidentiality.

We may receive personal data from you for the purposes of our money laundering checks, such as a copy of your passport. This data will only be processed for the purposes of preventing money laundering and terrorist financing as required by law.

Our work for you may require us to pass your information to our third-party service providers for the purposes of completing tasks and providing the Services to you on our behalf. However, when we use third party service providers, we disclose only the personal information that is necessary to deliver the Services and we have contracts in place that requires them to keep your information secure and not to use it for their own direct marketing purposes.

We will not sell or share your information for marketing purposes.

We do not transfer any information to third countries.

We do not use automated decision making or profiling.

Security precautions in place about data collected

When you give us personal information, we work hard to make sure that it's treated securely. Any sensitive information sent over the internet is password protected.

Non-sensitive details are sent normally over the Internet, and this can never be guaranteed to be 100% secure. As a result, while we strive to protect your personal information, we cannot guarantee the security of any information you transmit to us, and you do so at your own risk. Once we receive your information, we will do our best to ensure its security on our systems. Where we have given (or where you have chosen) a password which enables you to access certain information, you are responsible for keeping this password confidential. We ask you not to share your password with anyone.

How long will we hold your data for?

- Contracted Services: We will hold your data for 7 years in line with our regulatory requirements.
- Data held electronically will be deleted and paper data will be shredded.

Access to your information, correction, portability and deletion

Subject Access Request

You have a right to request a copy of the information that we hold about you. If you would like a copy of some or all your personal information, please email or write to us. We will respond to your request within one month of receipt of the request and verifying your identity.

We want to make sure your personal information is accurate and up to date. You may ask us to correct or remove information you think is inaccurate.

Objections to processing of personal data

You have a right to lodge an objection to the processing of your personal data if you feel the “grounds relating to your particular situation” apply. The only reasons we will be able to deny your request is if we can show compelling legitimate grounds for the processing.

Data Portability

It is also your right to receive the personal data which you have given to us, in a structured, commonly used and machine-readable format and you have the right to transmit that data to another controller without delay from the current controller if:

- (a) The processing is based on consent or on a contract, and
- (b) The processing is carried out by automated means.

Your Right to be Forgotten

Should you wish for us to completely delete all information that we hold about you, we may be contacted at:-

Email: enquiries@okwallace.co.uk, or

- In writing to: Mrs Olive Wallace, 101 Coolyvenny Road, Coleraine, Co. Londonderry BT51 3SF

Complaints

If you feel that your personal data has been processed in a way that does not meet the GDPR, you have a specific right to lodge a complaint with the relevant supervisory authority. The supervisory authority will then tell you of the progress and outcome of your complaint. The supervisory authority in the UK is the Information Commissioner’s Office.

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