



## OUR PRIVACY POLICY

### 1. IMPORTANT NOTICE.

This Privacy Policy notice explains how we obtain 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 changed or updated from time to time, in the UK ('Data Protection Legislation').

Please read the following carefully to understand our practices about your personal data and how we will treat it. We take your privacy seriously and use your personal data as further explained in this Privacy Policy. We are the "controller" of the personal data you provide to us.

### 2. ABOUT US.

Dave Parsons Accountancy Limited is an accountancy and tax advisory firm. We are registered in England as a limited company under number: 12961160 with a registered office at 4 Newbarn Park Road, Taunton, TA1 4NA.

### 3. HOW WE MAY COLLECT YOUR PERSONAL DATA.

We keep a record of your personal data, for example, when:

You request a quotation from us for the services we provide;

- . You contact us by email, telephone, post or social media (for example when you have a query about our services); or
- . Available from third parties and/or public resources (for example, from your employer or from Companies House).

#### 4. THE TYPE OF INFORMATION WE GATHER ABOUT YOU.

The information we collect about you may include the following:

- . Your personal details (for example your name and address);
- . Details of contact we have had with you in relation to proposed requests regarding our services
- . Details of any services you have received from us;
- . Information about your enquiries and/or complaints;
- . Information from other sources, such as publicly available information, information provided by your employer or our clients.

#### 5. HOW WE USE YOUR PERSONAL DATA.

We may process your personal data for purposes necessary for the performance of our contact with you, or your employer, or our clients and to comply with our 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, sub-contractor, 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 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 specific purpose for which we are using your data.

Like any business, we process personal data in the course of maintaining and administering our internal records. This includes processing your personal data to ensure that the information we hold about you is kept up to date and accurate.

We use the personal data we hold about you to help us respond to any enquiries or complaints you have made, or deal with any dispute which may arise in the course of us providing our products and services to you, in the most effective manner.

In certain circumstances, we use your personal data only to the extent required in order to enable us to comply with our legal obligations, including for fraud detection, investigation and prevention purposes. This may require us to provide your personal data to law enforcement agencies if they request it.

## 6. LEGAL GROUNDS FOR PROCESSING.

Data protection law requires us to only process your personal data if we satisfy one or more legal grounds. These are set out in data protection law and we rely on a number of different grounds for the processing we carry out. These are as follows:

### Consent

In certain circumstances, we process your personal data after obtaining your consent to do so for the purpose of:

- . sending you marketing communications about our products and services;
- . sharing your name, email address, postal address and telephone number with our trusted business partners so that they may market to you about their own similar products and services;
- . conducting marketing research;

- . obtaining your credit score so that we can establish the best possible payment terms we are able to offer to you.

Necessary for the performance of a contract and to comply with our legal obligations.

It is necessary for us to process your basic contact details, payment details and information about the business you represent for the performance of the Trading Terms or Terms of Trading between us. In particular, we rely on this legal ground to:

- . provide you with the products and services;
- . communicate with you about the products and services that we provide to you, including to let you know about major changes to those products and services or to the Trading Terms of Trading between us or to any related information;
- . provide and improve customer support; and
- . notify you about changes to our service

If you choose not to give some or all of the aforementioned information to us, this may affect our ability to provide our products and services to you.

In certain circumstances, we also use your personal data only to the extent required in order to enable us to comply with our legal obligations, including to detect, investigate and prevent fraud.

Necessary for the purposes of our legitimate business interests or those of a third party.

It is sometimes necessary to collect and use your personal data for the purposes of our legitimate interests as a business, which are to:

- . provide you with products and services that are as helpful and beneficial as possible, including by personalising our contact with you and making sure we tell you about all the offers that are relevant to you;
- . better understanding of our customer base so that we can improve our products and services and marketing activities (which should also benefit you);
- . comply with our contractual obligations to third parties;
- . develop and improve our site to enhance the customer experience;

- . train our staff so that we can provide you with a better customer service;
- . respond to any enquiries or complaints you have made, or deal with any dispute which may arise in the course of us providing our products and services to you; and
- . to ensure that content from our site is presented in the most effective manner for you and for your computer;
- . ensure effective operational management and internal administration of our business, document retention, compliance with regulatory guidance and exercise or defence of legal claims.

Where we think there is a risk that one of your interests or fundamental rights and freedoms may be affected we will not process your personal data unless there is another legal ground for us to do (either that we have obtained your consent to the processing or it is necessary for us to perform our contract with you or to comply with our legal obligations).

## 7. WHO WE SHARE YOUR PERSONAL DATA WITH.

We may provide your personal data to our suppliers and service providers, including other companies in our group, who provide certain business services for us and act as “processors” of your personal data on our behalf. In addition, we may disclose your personal data if we are under a duty to disclose or share your personal data in order to comply with any legal obligation, or in order to protect the rights, property, or safety, of our business, our customers or others. This includes, in specific cases, exchanging information with other organisations for the purposes of fraud protection.

In some cases, the personal data we collect from you may, for the purposes set out above, be transferred outside the European Economic Area (EEA) and such destinations may not have laws which protect your personal data to the same extent as in the EEA. We are required by data protection law to ensure that where we or our “processors” transfer your personal data outside of the EEA, it is treated securely and is protected against unauthorised access, loss or destruction, unlawful processing and any processing which is inconsistent with the purposes set out in this Privacy Policy.

## 8. DATA RETENTION.

We will only keep your personal data for as long as is necessary to fulfil the purposes of 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
- . Whether the purpose of the processing could reasonably be fulfilled by other means

## 9. DATA SECURITY.

We have put in place commercially reasonable and appropriate security measures to prevent your personal data from accidentally lost, used or accessed in an authorised 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.

## 10. RIGHTS OF ACCESS, CORRECTION, ERASURE, AND RESTRICTION.

It is important that the personal data we hold about you is accurate and up to date. If your personal information changes, please let us know of any changes.

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

- . You have the right to be provided with clear, transparent and easily understandable information about how we use your personal data and your rights. This is why we are providing you with this information in this Privacy Policy.
- . 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 have the right to ask us to delete or remove for us continuing to process it. You 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 have the right to maintain and reuse your personal data in a structured, commonly used and machine-readable format in certain circumstances. In addition, where certain conditions apply, you have the right to have such information transferred directly to a third party.
- . You also have the right to object where we are processing 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.

## 11. 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 direct marketing that you have indicated you would like to receive from us), you have the right to withdraw your consent for that specific processing at any time.

## 12. CONTACT US.

If you would like to exercise your data protection rights or if you are unhappy with how we have handled your personal data, please feel free to contact us by using the details set out on our site.

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>

## 13. PRIVACY POLICY CHANGES

This Privacy Policy was last updated April 2023