

PPT Accountancy Ltd. – Data Privacy Policy Notice

PPT Accountancy Ltd is responsible for the processing of your personal (not company) data. This privacy policy explains how we collect and use your personal data in a lawful, fair and transparent way in accordance with the General Data Protection Regulation (GDPR), the Data Protection Act (DPA) 2018 and other Data Protection Legislation as may be updated from time to time.

How we may collect your personal data

Data will be obtained from yourself or from a third party such as a previous adviser/accountant, financial adviser, your company, your employer, your bank, pension provider, HMRC, Companies House and publicly available resources.

The information we hold about you

It is important that the personal information we hold about you is accurate and current. Please keep us informed if there are any changes particularly to your contact details.

Data we hold may be contact emails, telephone numbers, addresses and other personal details such as date of birth, HMRC tax, N.I. and other references or notices, gender, marital status, income, bank account numbers, business activities, employment and pension information.

We will hold and may check proof of ID in order to comply with Money Laundering Regulations.

In order to provide the contracted services as per our engagement letter we may also request other information which we require as part of our professional services but this data will not be excessive.

How we will use the information about you

Here at PPT Accountancy Ltd we take your privacy seriously and we will only use your personal data in order to provide accountancy, CIS, payroll, workplace pension, tax compliance, tax advisory and other related services.

The main ways in which we will use your personal data are:

- To manage and administer your affairs as per your contracted services and to notify you of any changes to our services.
- For administration and invoicing purposes.
- To meet our legal and regulatory requirements.
- To comply with applicable legislation, including (but not limited to) - anti-money laundering, proceeds of crime or to respond to authorised agencies and government departments, the Police, the Serious Fraud Office or the Courts.

If you are a payroll client you will be a Data Controller with responsibility for ensuring your employees have given consent to holding their personal data. We will process payroll data as a Data Processor for your employees on a legal basis under GDPR.

We do not intend to use automated decision making in relation to your personal data.

Data sharing

We will share information as required by law or regulatory notice acting as your agent to HMRC (including HMRC Courts and Tribunal), Companies House, your pension provider, governing bodies, regulatory agencies, professional and expert advisory services, subcontracted professionals, IT and software (including cloud) support, and contracted third party service providers.

All our third party service providers are required to take commercially reasonable and appropriate security measures to protect your personal data. We will not share your personal data with any other ad hoc third parties for processing unless you have authorised this.

We may export personal data outside the EU/EEA/UK for the purposes of storage and data processing. You consent to such data export and we rely on their security although we will check their compliance where relevant and obtainable.

We will not share your information with third parties for marketing purposes.

Data security

We treat the security of your data seriously. We have put 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 third parties only if they have a business need to know and they are subject to a duty of confidentiality.

Data is held electronically and on hard copy files. We store data via third party servers including but not limited to Dropbox, Microsoft and Google products, protected by security features such as firewalls and anti-virus software. If you provide us with a USB memory stick, transportation may be required but will be restricted to only what is strictly necessary.

We use reputable tax, payroll and accounting software which may be located 'in the cloud', and if so we rely on the software provider's or cloud host's security features. When software is installed on our local computers the software is password protected. Our computers and servers are password protected.

Our website data is hosted on third party servers which are protected by firewalls and encryption. If the website IT support require access to the data on the full back end of our website we rely on their security measures.

If there is a data security breach we will notify you and the regulator where we are legally required to do so.

Data retention

We aim to retain your personal information for only as long as it is necessary to fulfil the services for which it is collected and to comply with any statutory or legal obligations. This is generally seven years. It is therefore important you retain your own records for HMRC enquiries which can go back twenty years.

Your rights

You have a right to request access to your personal information and request correction of the personal information that we hold about you. You have a right to request erasure of your personal information by us and/or our third parties under certain situations providing there is no overriding statutory obligation for the data to continue to be held. You can object to processing and transfer of your personal data in certain circumstances.

If you have any questions about this privacy notice please speak to your usual PPT contact.

We are registered with the Information Commissioner's Office (ICO). You have the right to make a complaint to the ICO on 0303 123 1113, the UK supervisory authority for data protection issues.

PPT Accountancy Ltd. R/o: Suites 12 & 13, Unit 32 Hobbs Ind. Est. Newchapel, Lingfield, RH7 6HN. Rg. No. 8033221 England