

CLARKSON HYDE LLP PRIVACY POLICY

INTRODUCTION

Clarkson Hyde LLP (“CH”, “we”, “us”, “our” and “ours”) are Chartered Accountants, Tax Experts and Business Advisers. We are registered in England and Wales as a limited liability partnership under number: OC326040 and our registered office is at:

3rd Floor Chancery House
St Nicholas Way
Sutton
Surrey
SM1 1JB

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.

We have appointed a data protection manager. Our data protection manager is our Data Protection Point of contact and is responsible for assisting with enquiries in relation to this privacy notice or our treatment of your personal data. Should you wish to contact our Data Protection Point of Contact you can do so using the contact details noted at the ‘Contact Us’ section at the end of this notice.

Personal data is any information relating to an identified or identifiable living person. We are strongly committed to protecting and respecting the personal data that we hold. This privacy statement describes why and how we collect and use personal data and provides information about individuals’ rights.

It applies to personal data provided to us, either by individuals themselves or by third parties acting on behalf of the individuals or from publicly available sources. We may use personal data provided to us for any of the purposes described in this privacy statement or as otherwise stated at the point of collection.

When collecting and using personal data, our policy is to be transparent about why and how we process personal data. CH processes personal data for numerous purposes, and the means of collection, lawful basis of processing, use, disclosure, and retention periods for each purpose may differ and are set out in the relevant sections below.

OUR PROCESSING ACTIVITIES

1. Professional Services

We provide services to individuals as well as businesses, non-profits, and other organisations. The exact data collected, processed and held will depend on the services to be provided.

How we collect personal data

Our policy is to collect only the personal data necessary for agreed purposes and we ask our clients only to share personal data which is strictly needed for those purposes. Generally we collect personal data from our clients directly, from a third party acting on the instruction of the relevant client, for example a bank or pension company or from publicly available sources, such as internet searches or Companies House. This information is typically provided by (but not limited to) the following means: post, email, telephone, in person, secure portal or other means of electronic data transmission.

What we collect and use

The data that is processed is dependent on the service that is being provided and on the recipient of this service.

Services to individuals. Personal data may include contact details and tax identifiers, information about business activities, investments, and other financial interests, payroll and other income, and any other specifically relevant data.

Services to businesses, non-profits, and other organisations. We process the personal data of individuals associated with our clients. Personal data may include any relevant financial or non-financial information necessary for us to provide our services. As an example, this may include contact details, payroll data, employee information including pension details, lists of shareholders, customers and suppliers and any other specifically relevant data.

How/Why do we use it

Where we engage with clients for professional services, we may collect and process personal data for the following reasons:

Contract entry

In order to commence working with our clients we are legally required to take certain steps, such as assuring ourselves of their identity. In order to do so we require some personal data from them.

In order to satisfy a contractual obligation

We request that clients only provide the personal data that is required for us to fulfil our contractual obligation. During the course of our engagement with our clients we require to continue processing personal data about them to enable us to deliver the contracted for services.

Our own legitimate interests

We may also use personal data on the basis of our own legitimate interests provided that those interests do not override any of our client interests, rights and freedoms which require the protection of personal data. These interests include promoting and developing our services and assessing our performance. Activities promoting our services include business to business marketing which they may opt-out of at any time. Opt-out can be achieved by responding using the unsubscribe options contained within the information you have received or by emailing cph@clarksonhyde.com.

Legal Obligations

Certain statutory obligations apply to our work which require us to process personal data and in some circumstances to provide it to third parties such as law enforcement. Where such obligations arise we will, insofar as is possible without breaching any other duty we owe to those services, advise you of our intention to process your data for their purposes.

Data retention

We retain the personal data processed by us in a live environment for as long as is considered necessary for the purpose(s) for which it was collected (including as required by applicable law or regulation, typically 6 years). We may keep data for longer in order to establish, exercise, or defend our legal rights and the legal rights of our clients.

In addition, personal data may be securely archived with restricted access and other appropriate safeguards where there is a need to continue to retain it.

2. Business Contacts

Personal data from our contacts, which covers both potential and existing clients and/or individuals associated with them, are held in our Practice Management database.

How we collect personal data

This information is entered into the database after contact is made between a staff member of CH and a business contact individual.

What we collect and use

Personal data that may be stored in the Practice Management database includes, but is not limited to, name, email address, physical address, job title, and details of the initial meeting. In addition, personal data may be securely archived with restricted access and other appropriate safeguards where there is a need to continue to retain it.

How/Why do we use it

Where personal data on business contacts is held, it is used for a number of purposes, such as:

- Promotion and development of our range of services
- Communication of technical updates
- Hosting and facilitating of events
- Managing our relationships

Data retention

Personal data will be retained on the CH Practice Management database for as long as it is necessary for the purposes set out above (eg. for as long as we have, or need to keep a record of, a relationship with a business contact).

3. Existing Staff

We collect personal data relating to our existing staff as part of the administration, management and promotion of our business activities.

Our staff employment contracts explain further how personal data is held for our staff and partners.

4. Job applicants

How/What we collect and use

Where an individual is applying to work for CH, personal data is collected through the application process.

How/Why do we use it

We process this data in order to assess their potential employment at CH.

Data retention

Personal data collected for applicants is held for as long as necessary in order to fulfil the purpose for which it was collected, or for a maximum of 1 year where those purposes no longer become necessary.

5. Suppliers

We collect and process personal data about our suppliers and the individuals associated with them. The data is held to manage our relationship, to contract and receive services from them, and in some cases to provide professional services to our clients.

How we collect personal data

Typically we collect the data directly from the supplier or from an applicable website promoting the supplier's services and contact details.

What we collect and use

We will hold suppliers' names, contact names and contact details, which may include banking information.

How/Why do we use it.

Receiving goods and services.

We process personal data in relation to our suppliers and their staff as necessary to receive the services.

Providing services to our clients

Where a supplier is helping us to deliver professional services to our clients, we process personal data about the individuals involved in providing the services in order to administer

and manage our relationship with the supplier and the relevant individuals and to provide such services to our clients.

Administering, managing and developing our businesses and services

We process personal data in order to run our business, including:

- managing our relationship with suppliers;
- developing our businesses and services, such as identifying client needs and improvements in service delivery;
- maintaining and using IT systems;
- hosting or facilitating the hosting of events; and
- administering and managing our website and systems and applications.

Security, quality and risk management activities

We have security measures in place to protect our and our clients' information (including personal data), which involve detecting, investigating and resolving security threats. Personal data may be processed as part of the security monitoring that we undertake; for example, automated scans to identify harmful emails.

Complying with any requirement of law, regulation or a professional body of which we are a member

We are subject to legal, regulatory and professional obligations. We need to keep certain records to show we comply with those obligations and those records may contain personal data.

Data retention

We retain the personal data processed by us for as long as is considered necessary for the purpose for which it was collected (including as required by applicable law or regulation). Data may be held for longer periods where required by law or regulation and in order to establish, exercise or defend our legal rights.

6. Visitors to our offices

We require visitors to our offices to sign in at reception for the purposes of fire regulations and we keep this record of visitors for a short period of time. Our visitor records are securely stored and only accessible on a need to know basis.

7. Visitors to our website

Personal data provided by individuals who visit our website are held in our Practice Management database.

How we collect personal data and what we collect and use

Visitors to our website are generally in control of the personal data shared with us, however, in common with most websites, our website gathers limited personal data automatically via the use of cookies (see below for more information).

Where data is collected automatically, the data that we may collect includes technical information, including:

The Internet Protocol (IP) address used to connect an individual's computer to the Internet, login information, browser type and version, time zone setting, browser plug-in types and versions, operating system and platform. Other data about an individual's visit includes the Uniform Resource Locators (URL), clickstream to, through and from our site (including data and time), services viewed or searched for, page response times, download errors, length of visits to certain pages and page interaction information (such as scrolling, clicks and mouse-overs).

If visitors complete any feedback or 'contact us' forms we may collect the following information and store it on our Practice Management database. This may include, but is not limited to:

Name, company name, job title, contact information including address, email address and telephone numbers, preferences and interests for newsletters and promotions.

Often individuals who visit our website additionally fall in to another category as listed in this privacy statement. For example they may be current clients, business contacts or become clients in the future. Where this is the case, data held and processed as a result of using our website may also become data that is held and processed for another purpose.

We do not share the personal data with third parties and we do not give the log files or the information they contain to any third parties.

How/Why do we use it

When a visitor provides personal data, we will use it for the purpose for which it was provided to us as stated at the point of collection (or as obvious from the context of the collection).

We use the information collected in order that:

We may periodically send promotional emails and letters about new services, events or other information which we think subscribers to our marketing information may find interesting.

We may better understand the needs of subscribers to our marketing information in order to add value with the information we share.

From time to time, we may also use the information to make contact for market research purposes. We may make contact by email, phone or mail.

To help us improve the content, design and performance of the site.

Data retention

Personal data collected via our website will be retained on the CH Practice Management database for as long as it is necessary for the purposes set out above (eg for as long as we have a relationship with the relevant individual). In addition, personal data may be securely archived with restricted access and other appropriate safeguards where there is a need to continue to retain it.

Links to other websites

Our website may contain links to other websites of interest. However, once individuals have used these links to leave our site, it should be noted that we do not have any control over that other website. Therefore, we cannot be responsible for the protection and privacy of any information which the individual provides whilst visiting such sites and such sites are not governed by this privacy statement. Individuals should exercise caution and look at the privacy statement applicable to the website in question.

Technical

Cookies

A cookie is a tiny file that is saved by your browser when you visit a website. It enables certain information about your visit to be stored by the site. Some of these cookies are essential in order for a website to run as you expect it to while others allow us to provide you with a better service (for example, understanding what content is most popular, to provide you more of the same). The use of cookies is now standard operating procedure for most websites. However, for anyone uncomfortable with the use of cookies, most browsers now permit users to opt-out of receiving them.

Google Analytics

Our site uses Google Analytics Demographics and Interests reporting. Google have provided more information at <https://support.google.com/ads/answer/2662922?hl=en-GB> and a simple plugin at <https://tools.google.com/dlpage/gaoptout/> to allow users to opt-out of this feature on any website.

DATA SECURITY

We take the security of all the data we hold very seriously and have put in place commercially reasonable and appropriate security measures to prevent personal data from being accidentally lost, used or accessed in an unauthorised way, altered or disclosed. In addition we limit access to personal data to those employees, agents, contractors and other third parties who have a business need to know. They will only process personal data on our instructions and they are subject to a duty of confidentiality.

Unfortunately, the transmission of information via the internet is not completely secure. Although we will do our best to protect your personal data, we cannot guarantee the security of your data transmitted to our site; any transmission is at your own risk. Once we have received your information, we will use strict procedures and security features to try to prevent unauthorised access.

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.

DATA SHARING

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.

Personal data held by us may be shared with:

Third party organisations that provide applications/functionality, data processing or IT services to us.

We use third parties to support us in providing our services and to help provide, run and manage our internal IT systems. For example, providers of information technology, cloud based software as a service provider, website hosting and management, data back-up, security and storage services. All of our third-party service providers are required to take commercially reasonable and appropriate security measures to protect personal data. We only permit our third-party service providers to process personal data for specified purposes and in accordance with our instructions.

Group businesses

We may share personal data with our group businesses where necessary for administrative purposes and to provide professional services to our clients.

Law enforcement or regulatory agencies or those required by law or regulations.

Occasionally, we may receive requests from third parties with authority to obtain disclosure of personal data, such as to check that we are complying with applicable law and regulation, to investigate an alleged crime or to establish, exercise or defend legal rights. We will only fulfil requests for personal data where we are permitted to do so in accordance with applicable law or regulation.

Other third parties

We may share personal data with other third parties, for example in the context of the possible sale or restructuring of the business.

TRANSFERRING PERSONAL DATA OUTSIDE THE EUROPEAN ECONOMIC AREA (EEA)

Where possible, personal data resides within the EEA, but may be passed to a third party outside the EEA as part of our client servicing. We will take all reasonable steps to ensure that your data is treated securely, in accordance with this privacy statement.

We have taken steps to ensure all personal data is provided with adequate protection and that all transfers of personal data outside the EEA are done lawfully. Where we transfer personal data outside of the EEA to a country not determined by the European Commission as providing an adequate level of protection for personal data, the transfers will be under an agreement which covers the EEA requirements for the transfer of personal data outside the EEA.

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 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.

If you want to exercise any of the above rights, please contact our Data Protection Point of Contact using the contact details noted at the 'Contact Us' section at the end of this notice.

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.

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. To withdraw your consent, please contact our Data Protection Point of Contact using the contact details noted at the 'Contact Us' section at the end of this notice or, if the consent is specifically in relation to direct marketing, please email cph@clarksonhyde.com or use the unsubscribe links on any marketing mailing.

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.

CHANGES TO THIS NOTICE

We recognize that transparency is an ongoing responsibility so we will keep this privacy statement under regular review.

This privacy notice was last updated on 11 June 2018

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 contact our Data Protection Point of Contact at:

Data Protection Manager
Clarkson Hyde LLP
3rd Floor Chancery House
St Nicholas Way
Sutton
Surrey
SM1 1JB

Email: mhc@clarksonhyde.com

Tel: 020 8652 2450

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>