

# MCADAM & CO LTD [04419650] - PRIVACY POLICY

## Privacy policy

At MCADAM & CO LTD we respect the privacy of visitors to our website [www.accountantuk.com](http://www.accountantuk.com). This policy is concerned with how we collect information, what we do with it and what controls you have over your personal information.

## Your Privacy

We take our duty to process your personal information very seriously. This policy explains how we collect, manage, use and protect your personal information.

We may change this document from time to time to reflect the latest view of what we do with your information. Please check back frequently; you will be able to see if changes have been made by the date it was last updated.

Refer to the sections below for more details on how and why we use your personal information:

1. Who are we?
2. What personal information we collect and how we use it
3. Legitimate interests
4. Sharing your information
5. Retaining your information
6. Your details on the web
7. What are your rights?
8. How to contact us

## 1. Who are we?

In this policy references to the Company Name, or to 'we' or 'us' are to the MCADAM & CO LTD which is a registered company in England and Wales under company number; 04419650.

## 2. What personal information we collect and how we use it

### What we need

The MCADAM & CO LTD is what's known as the 'controller' of the personal information you provide to us. We will usually collect basic personal information about you like your name, postal address, telephone number, email address, DOB, Marital status and in some cases Place of Birth (POB) & Mother's Maiden Name (MMN) when incorporating a limited company as required by Companies House.

### Why we need it

We collect your personal information in connection with completing your Accountancy & Taxation needs, to apprise you of up-coming changes to accounting & tax legislation, tips to improve your business profitability and / or increase tax efficiency and finally, to inform you of any latest scams to be aware of.

The information is either needed to fulfil your request or to enable us to provide you with a more personalised service. You don't have to disclose any of this information to browse our site. However, if you choose to withhold requested information when working with us, we may not be able to provide you with certain services.

## Our marketing

Sometimes, with your consent, we will process your personal information to provide you with information about our work or our activities that you have requested or are expecting.

On other occasions, we may process personal information when we need to do this to fulfil a contract (for example, if you have taken up the tax investigation insurance) or where we are required to do this by law or other regulations.

We also process your information when it is in your legitimate interests to do this and when these interests do not override your rights. Those legitimate interests include providing you with information on changes in tax legislation, financial advice that saves you money and tax and business advice with the aim to increase your profitability. Please see the section on 'Legitimate Interest' for more information.

#### How we obtain your details

- When you provide it to us directly.
- We don't collect your personal data from any other sources.
- We will also hold information about your details so that we can respect your preferences for being contacted by us.
- When you provide permission to other organisations to share it with us (including mortgage companies & rental reference companies).
- When we collect it as you use our websites or apps.
- When you have given it to a third party and you have provided permission to pass your information on to us.
- From publicly available sources (where possible) to keep your information up to date (e.g. the Post Office's National Change of Address database).

We combine the information from these sources with the information you provide to us directly.

#### Children

Children as defined within GDPR as person(s) under 13: are only accepted with a parent/guardian's knowledge and only used as required by law e.g. repayment of child benefit calculations on the tax return or assisting with child tax credits claims.

We do not hold any other child data or process any child data for any other reason.

#### Anything else?

All the personal information we process is processed within the EEA. However for the purposes of IT hosting and maintenance your information may be situated outside of the European Economic Area (EEA). This will be done in accordance with guidance issued by the Information Commissioner's Office.

### 3. Legitimate interests

We have a number of lawful reasons that mean we can use your personal information. One of these is something called 'legitimate interests'. Broadly speaking Legitimate Interests means we can process your personal information if:

- We have a genuine and legitimate reason; and
- We are not harming any of your rights and interests.

We make of legitimate interests when you are a client may be to send you information about changes to accounting/tax legislation, profit improvement information and other articles and information which may be of interest to you.

### 4. Sharing your information

We do not share your information with any other organisations or individuals unless we are obliged to by law, for purposes of national security, taxation, Companies House accounting regulations, tax credit renewal declarations, national statistics forms, criminal investigations and in the following instances:

- If you have agreed that we may do so, e.g. mortgage application or guarantor reference.
- When we use other companies to provide services on our behalf, e.g. courier companies only to return your confidential business/tax records in a reliable, confidential and safe manor.
- If we run an event in partnership with other named organisations your details may need to be shared; this will only be with your consent.

And, we will never sell or rent your personal information to other organisations.

## 5. Retaining your information

We will only retain your personal data for as long as necessary to fulfil the purposes in which we collected for, including for the purposes of satisfying any legal, accounting, or reporting requirements.

Under Anti-Money Laundering (AML) Regulations (also known as MLR), we are required to retain your personal data for a mandatory five years after our formal disengagement.

A disengagement occurs when:

- Your company has been dissolved.
- You switch to another accountancy provider.
- With dormant clients (where your tax/accountancy requirements have come to a natural end), I choose to issue a disengagement letter.
- Death.

In all cases a disengagement letter is issued which confirms the retention period of your personal data.

## 6.1 Our Cookie Policy

Cookies are small text files that are stored on your computer when you visit a website. They are mainly used as a way of improving the website functionalities or to provide more advanced statistical data. Please see our cookie Policy on our website.

## 6.2 Google Analytics

Our website uses Google Analytics which relies on cookies to generate more advanced visitor charts and data mining reports. Similarly to our server-based logs, Google Analytics collects anonymous information that will not be used to identify our website visitors.

## 6.3 Third-party link

This website may include links to third-party websites, plug-ins and applications. Clicking on those links or enabling those connections may allow third parties to collect or share data about you. We do not control these third-party websites and are not responsible for their privacy statements. When you leave our website, we encourage you to read the privacy notice of every website you visit

## 7. What are your rights?

You have a number of rights about how the personal information you provide can be used. These are:

- Transparency over how we use your personal information (right to be informed).
- The ability to request a copy of the information we hold about you, which will be provided to you within one month (right of access).
- Update or amend the information we hold about you if it is wrong (right of rectification).
- Ask us to stop using your information (right to restrict processing).
- Ask us to remove your personal information from our records (right to be 'forgotten')<sup>1</sup>.
- Object to the processing of your information for marketing purposes (right to object).
- Obtain and reuse your personal information for your own purposes (right to data portability).
- Not be subject to a decision when it is based on automated processing (automated decision making and profiling).
- Remember, you can change the way you hear from us or withdraw your permission for us to processing your personal information at any time by contacting me on email or in writing.

If you would like to know more about your rights under the data protection law, you can find out more at the Information Commissioners Office website.

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<sup>1</sup> The Anti-Money Laundering Regulations 2017 overrides the right to be forgotten until the 5<sup>th</sup> anniversary of our services being terminated from either side, at which point your personal data will be destroyed and deleted automatically.

## 8. How to contact us

If you wish to talk through anything in our privacy policy, find out more about your rights or obtain a copy of the information we hold about you, please contact us (details at the bottom of this page), we will be happy to help.

If you wish to raise a complaint on how we have handled your personal information, you can contact us and we will investigate the matter. If you are not satisfied with our response or believe we are not processing your personal information in accordance with the law you can complain the Information Commissioner's Office (ICO).

If you wish to talk to us about anything in the policy or the information we hold about you please contact us:

By telephone: 08451 249797 | 01752 219901

By email: [doug@accountantuk.com](mailto:doug@accountantuk.com)

By post: 36 Highglen Drive, Plymouth, PL7 5LA.

This document was last updated: October 2019