

WITTON METCALFE PRIVACY NOTICE

The Principal of WM Accountants Ltd (known as Witton Metcalfe) holds and processes personal data about clients in order to provide accountancy and related services. In doing so, we comply with relevant data protection legislation. The Principal is a data controller and this notice is issued on behalf of the Principal.

As a data controller, the Principal collects and processes your personal data for the purpose of complying with their responsibilities under the terms of their engagement letter in place, and for other legitimate purposes relating to the operation and management of the company. This includes:

- Communicating with clients in relation to their accounts and tax returns, and in the course of providing other consultancy services and general financial advice.
- Communicating on your behalf with the HMRC as instructed and agreed.
- In the course of providing payroll and related services.
- General administration and communication.

The Principal, as data controller, will need to manage the data held about you and to do this, the company will process the data. Data processors are engaged by the Principal either as direct employees of Witton Metcalfe or as service providers who must meet the company's standards of compliance with the relevant data protection legislation.

Personal data about you is processed by:

Mike Nijhuis - Principal
Claudia Natri
Rebecca Nijhuis

Processors of personal data may change from time to time and you will be informed of any changes at regular intervals.

This notice describes the personal data that we collect about you and other people in connection with your tax and financial information.

Legislation dictates ***personal data as any information that could be used to identify a living individual.***

Who has provided this data?

Much of the data has been provided by you, the client at the beginning of commencing business with us at the same time as our letter of engagement was issued and agreed.

In addition, in the course of providing a service, we will have requested and been provided with data from you or others acting on your behalf in order to provide a service and carry out our obligations to you as a client.

What personal data do we hold?

We may collect, use or otherwise process the following types of information about you and in some cases about a spouse, civil partner, partner or nominated person.

Name, gender, address, date of birth, NI number, passport and/or driver license number

Contact details including mobile/landline numbers and email address

Bank account details

Income and tax return information

Tax allowances that you may have

Your contract of employment and salary, terms and conditions

The data is held to enable us to discharge the services agreed under our engagement, and for other related purposes including updating client records, analysis for management purposes and statutory returns, crime prevention and legal and regulatory compliance. We process this data on your behalf and we comply with the relevant provisions of the General Data Protection Regulation (GDPR 2016).

How long will your data be kept?

This data will be kept throughout the period of our engagement. In the event that we cease to act in relation to your tax affairs, we will retain any data that we are required to by law, regulatory and statutory bodies for the time specified. In the absence of any of these requirements, we will retain your data for a minimum of 7 years at which time your data will be deleted from our files and removed/deleted

from our data storage and records (other than those documents which we consider to be of continuing significance).

As data controller, the Principal will undertake to ensure all data that requires removal or deletion is done so by any processors engaged by us to process your data on or off site.

What is our legal basis for processing your personal data?

Under laws that are designed to protect your personal data, we need to have a legal basis each time that we use, share or otherwise process your personal data.

Certain uses of your personal data are made under the legitimate interests basis rather than by direct consent. 'Legitimate interests' in this context means operating the company and the services we provide effectively, efficiently and as securely as possible. For example, ensuring matters relating to your financial and tax matters are communicated to you, contacting you, making sure we have full and complete information.

We will always ensure that any third parties with whom we need to share your data are subject to privacy and security obligations consistent with this privacy notice and applicable laws.

Your rights

You have a right to access a copy of your personal data and require that we rectify any errors in the data that we hold, or request that we erase your personal data, although this may mean in some circumstances that we are unable to carry out what may be deemed essential communication with you or others on your behalf.

In some circumstances, you can also require that we restrict the way we process your personal data, object to its processing or request a copy of your personal data for the purposes of transmitting elsewhere.

Where we have requested and obtained your consent to process particular information, you may withdraw that consent at any time. However, if we do not hold all the information to provide necessary administration, we may not be able to carry out essential services for you that you require or in the way you require.

Contact details:

If you have any questions about this privacy notice please contact the Director by using the following contact details:

Mike Nijhuis
Principal
WM Accountants Ltd (known as Witton Metcalfe)
London House
77 High Street
Sevenoaks, Kent
TN13 1LD

Tel: 01732 454171

Email: mike@wittonmetcalfe.com

What if you have a complaint?

To make a complaint about how we have handled your information, contact us as set out above. If you are not satisfied with our response to your complaint or believe our processing of your information does not comply with data protection law, you can make a complaint to the Information Commissioner's Office (<https://ico.org.uk>). Its contact details are:

Address: Wycliffe House, Water Lane, Wilmslow, Cheshire SK9 5AF.

Tel: 01625 545 745