



Newman Accountancy Services Ltd

We work WITH you!

PRIVACY NOTICE

Who We Are

We gather and process your personal information in accordance with this privacy notice and in compliance with the relevant data protection Regulation and laws. This notice provides you with the necessary information regarding your rights and our obligations, and explains how, why and when we process your personal data.

NEWMAN ACCOUNTANCY SERVICES LTD's registered office is at 8a Fox and Pheasant Centre, White Colne, Essex, CO6 2PS and we are a company registered in England and Wales under company number 07299462.

We are registered on the Information Commissioner's Office Register; registration number ZA092072 and act as the data controller when processing your data. Our designated Data Protection Officer/Appointed Person is Susan Newman, who can be contacted at 8a Fox and Pheasant Centre, White Colne, Essex, CO6 2PS. Email: Susan@newman-accountancy.co.uk.

Information That We Collect

NEWMAN ACCOUNTANCY SERVICES LTD processes your personal information to meet our legal, statutory and contractual obligations and to provide you with our products and services. We will never collect any unnecessary personal data from you and do not process your information in any way, other than as specified in this notice.

We may collect, use, store and transfer different kinds of personal data about you which we have grouped together as follows:

- **Identity Data** - Includes first name, maiden name, last name, username or similar identifier, marital status, title, date of birth and gender.
- **Contact Data** - Includes company address, email address and telephone numbers.
- **Transaction Data** - Includes details about payments to and from you and other details of the services you use from us.
- **Technical Data** - Includes internet protocol (IP) address, your login data, browser type and version, time zone setting and location, browser plug-in types and versions, operating system and platform and other technology on the devices you use to access this website.
- **Profile Data** - Includes your username and password, preferences, feedback and survey responses.
- **Usage Data** - Includes information about how you use our website, products and services.
- **Marketing and Communications Data** - Includes your preferences in receiving marketing from us and our third parties and your communication preferences.

We do not collect any **Special Categories of Personal Data** about you (this includes details about your race or ethnicity, religious or philosophical beliefs, sex life, sexual orientation, political opinions, trade union membership, information about your health and genetic and biometric data). Nor do we collect any information about criminal convictions and offences.

How we collect that Information:

We use different methods to collect data from and about you including:

Direct interactions. You may give us your Identity / Contact data by filling in forms or by corresponding with us by post, phone, email or otherwise. This includes personal data you provide when you:

- apply for our products or services
- create an account on our website
- subscribe to our service or publications
- request marketing to be sent to you
- enter a survey
- give us some feedback.

Automated technologies or interactions. As you interact with our website, we may automatically collect Technical Data about your equipment, browsing actions and patterns. We collect this personal data by using cookies, server logs and other similar technologies. Please see our cookie policy for further details.

Third parties or publicly available sources.

We may receive personal data about you from various third parties, including technical data from the following parties:

- analytics providers [such as Google based outside the EU]
- advertising networks [such as Google based outside the EU]
- search information providers [such as Google based outside the EU].

How We Use Your Personal Data

NEWMAN ACCOUNTANCY SERVICES LTD takes your privacy very seriously and will never disclose, share or sell your data without your consent; unless required to do so by law. We only retain your data for as long as is necessary and for the purpose(s) specified in this notice. Where you have consented to us providing you with promotional offers and marketing, you are free to withdraw this consent at any time. The purposes and reasons for processing your personal data are detailed below: -

| Purpose/Activity | Type of data | Lawful basis for processing including basis of legitimate interest |
|---|---|--|
| <p>To perform our services to you including:</p> <ul style="list-style-type: none"> Producing your annual accounts and tax calculations Manage payments, fees and charges Collect and recover money owed to us | <ul style="list-style-type: none"> Identity Contact Financial Transaction Marketing and Communications | <ul style="list-style-type: none"> Performance of a contract with you Necessary for our legitimate interests (to recover debts due to us) |
| <p>To manage our relationship with you which will include:</p> <ul style="list-style-type: none"> Notifying you about changes to our terms or privacy policy Asking you to leave a review or survey | <ul style="list-style-type: none"> Identity Contact Profile Marketing and Communications | <ul style="list-style-type: none"> Performance of a contract with you Necessary to comply with a legal obligation Necessary for our legitimate interests (to keep our records updated and to study how customers use our products/services) |
| <p>To enable you to complete a survey</p> | <ul style="list-style-type: none"> Identity Contact Profile Usage Marketing and Communications | <ul style="list-style-type: none"> Performance of a contract with you Necessary for our legitimate interests (to study how customers use our products/services, to develop them and grow our business) |
| <p>To administer and protect our business and this website (including troubleshooting, data analysis, testing, system maintenance, support, reporting and hosting of data)</p> | <ul style="list-style-type: none"> Identity Contact Technical | <ul style="list-style-type: none"> Necessary for our legitimate interests (for running our business, provision of administration and IT services, network security, to prevent fraud and in the context of a business reorganisation or group restructuring exercise) |

| Purpose/Activity | Type of data | Lawful basis for processing including basis of legitimate interest |
|--|---|---|
| | | <ul style="list-style-type: none"> Necessary to comply with a legal obligation |
| To use data analytics to improve our website, products/services, marketing, customer relationships and experiences | <ul style="list-style-type: none"> Technical Usage | Necessary for our legitimate interests (to define types of customers for our products and services, to keep our website updated and relevant, to develop our business and to inform our marketing strategy) |
| To make suggestions and recommendations to you about goods or services that may be of interest to you | <ul style="list-style-type: none"> Identity Contact Technical/Usage Profile | Necessary for our legitimate interests (to develop our products/services and grow our business) |

Your Rights

You have the right to access any personal information that NEWMAN ACCOUNTANCY SERVICES LTD processes about you and to request information about: -

- What personal data we hold about you
- The purposes of the processing
- The categories of personal data concerned
- The recipients to whom the personal data has/will be disclosed
- How long we intend to store your personal data for
- If we did not collect the data directly from you, information about the source

If you believe that we hold any incomplete or inaccurate data about you, you have the right to ask us to correct and/or complete the information and we will strive to do so as quickly as possible; unless there is a valid reason for not doing so, at which point you will be notified.

You also have the right to request erasure of your personal data or to restrict processing (*where applicable*) in accordance with the data protection laws; as well as to object to any direct marketing from us. Where applicable, you have the right to data portability of your information and the right to be informed about any automated decision-making we may use.

If we receive a request from you to exercise any of the above rights, we may ask you to verify your identity before acting on the request; this is to ensure that your data is protected and kept secure.

Sharing and Disclosing Your Personal Information

We do not share or disclose any of your personal information without your consent, other than for the purposes specified in this notice or where there is a legal requirement. NEWMAN ACCOUNTANCY SERVICES LTD uses third-parties to provide the below services and business functions; however, all processors acting on our behalf only process your data in accordance with instructions from us and

comply fully with this privacy notice, the data protection laws and any other appropriate confidentiality and security measures.

Safeguarding Measures

NEWMAN ACCOUNTANCY SERVICES LTD takes your privacy seriously and takes every reasonable measure and precaution to protect and secure your personal data. We work hard to protect you and your information from unauthorised access, alteration, disclosure or destruction and have several layers of security measures in place

Transfers Outside the EU

NEWMAN ACCOUNTANCY SERVICES LTD utilise some products or services (*or parts of them*) that may be hosted/stored in non-EU countries, which means that we may transfer any information which is submitted by you through the website outside the European Economic Area ("EEA") for the below purposes: -

Google, Dropbox, Website hosting etc

Therefore, when you use our website/send us an email/sign up to our newsletter etc, the personal information you submit may be stored on servers which are hosted in non-EU countries. Where this is the case, we will take steps to ensure that those providers use the necessary level of protection for your information and abide by strict agreements and measures set out by NEWMAN ACCOUNTANCY SERVICES LTD to protect your data and comply with the relevant data protection laws.

Consequences of Not Providing Your Data

You are not obligated to provide your personal information to NEWMAN ACCOUNTANCY SERVICES LTD, however, as this information is required for us to provide you with our services and legitimate interests, we will not be able to offer some/all our services without it.

Legitimate Interests

As noted in the '*How We Use Your Personal Data*' section of this notice, we occasionally process your personal information under the legitimate interests' legal basis. Where this is the case, we have carried out a thorough Legitimate Interests' Assessment (LIA) to ensure that we have weighed your interests and any risk posed to you against our own interests; ensuring that they are proportionate and appropriate.

We use the legitimate interests' legal basis for processing your financial information for tax, legal and compliance purposes, as agreed in our engagement letters and terms of business.

How Long We Keep Your Data

NEWMAN ACCOUNTANCY SERVICES LTD only ever retains personal information for as long as is necessary and we have strict review and retention policies in place to meet these obligations. We are required under UK tax law to keep your basic personal data (*name, address, contact details*) for a minimum of 7 years after which time it will be destroyed.

Where you have consented to us using your details for direct marketing, we will keep such data until you notify us otherwise and/or withdraw your consent.

Lodging A Complaint

NEWMAN ACCOUNTANCY SERVICES LTD only processes your personal information in compliance with this privacy notice and in accordance with the relevant data protection laws. If, however you wish to raise a complaint regarding the processing of your personal data or are unsatisfied with how we have handled your information, you have the right to lodge a complaint with the Information Commissioner's Office (ICO), the UK supervisory authority for data protection issues (www.ico.org.uk). We would, however, appreciate the chance to deal with your concerns before you approach the ICO so please contact us in the first instance.

NEWMAN ACCOUNTANCY SERVICES LTD

Mrs Susan Newman

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