

Atria Associates Ltd - Privacy Notice

Introduction

We respect and value the privacy of our clients and contacts and will only collect and use personal data in ways that are described here, and in a way that is consistent with our obligations and your rights under the law.

For our clients this notice replaces the clauses in our current general terms and conditions (2017) relating to "Confidentiality" (paragraphs 7-9) and the "Data Protection Act 1998" (paragraph 13).

Information about us

Atria Associates Ltd.

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What does this notice cover?

This Privacy Notice explains how we use your personal data, how it is collected, how it is held and how it is processed. It also explains your rights under the law relating to your personal data.

What is personal data?

Personal data is defined by the General Data Protection Regulation (EU Regulation 2016/679) (the "GDPR") as 'any information relating to an identifiable person who can be directly or indirectly identified in particular by reference to an identifier'.

Personal data is, in simple terms, any information about you that enables you to be identified.

Personal data covers obvious information such as your name and contact details, but also covers less obvious information such as identification numbers, electronic location data, and other online identifiers.

What are my rights?

Under the GDPR, you have the following rights:

- The right to be informed about our collection and use of your personal data. This Privacy Notice should tell you everything you need to know, but contact us if anything is not clear.
- The right to access the personal data we hold about you.
- The right to have your personal data rectified if any of it is inaccurate or incomplete.
- The right to be forgotten, i.e. the right to ask us to delete or otherwise dispose of any of your personal data that we have*.
- The right to restrict (i.e. prevent) the processing of your personal data*.
- The right to object to us using your personal data for a particular purpose*.
- The right to data portability. This means that you can ask us for a copy of your personal data to re-use with another service or business.
- Rights relating to automated decision-making and profiling, however we do not use your personal data in this way.

*Restricting the use of, or removing, current personal data may make it impossible for us to provide services and advice.

Further information about your rights can be obtained from the Information Commissioner's Office or your local Citizens Advice Bureau.

If you have any cause for complaint about our use of your personal data, you have the right to lodge a complaint with the Information Commissioner's Office.

What personal data do you collect?

We may collect some or all of the following personal data (this may vary according to your relationship with us:

- Name;
- Date of birth;
- Gender;
- Address;
- Email address;
- Telephone number;
- Business name;
- Job title;
- Profession;
- Payment information;
- Information about your preferences and interests;
- Tax and National Insurance references and numbers.

Your personal data is obtained from the following third parties:

- Government agencies (eg HMRC and Companies House);
- Previous advisors;
- Any other parties the details of which are provided by you.

How do you use my personal data?

Under the GDPR, we must always have a lawful basis for using personal data. This may be because the data is necessary for the performance of a contract with you, because you have consented to our use of your personal data, or because it is in our legitimate business interests to use it.

Your personal data will be used for the following purposes:

- Providing the accounting, taxation, statutory and related services and advice we are contracted to provide.
- Personalising and tailoring our services.
- Communicating with you by telephone or other electronic means concerning the above services and related matters.
- Maintaining our own accounting records, as required by company and tax law and regulation;
- Maintaining records of our dealings with you for the purposes of our professional indemnity insurance and Anti Money Laundering regulations.

We currently do not use your personal data for marketing purposes, rather all contact with you, relating to news or information we have gathered, will relate directly to the services and advice we are contracted to provide.

If this situation changes we will update this notice and you will be enabled to opt in or out of any marketing contact.

How long will you keep my personal data?

We will not keep your personal data for any longer than is necessary in light of the reason(s) for which it was first collected. Your personal data will therefore be kept for the following periods (or, where there is no fixed period, the following factors will be used to determine how long it is kept):

- Accounting and tax data will be kept for six years after the accounting or tax year;
- Our own accounting data, containing your personal data, will be kept for six years following our own accounting year to 31 March;
- Data held for company secretarial purposes, our own insurance or Anti Money laundering regulations, will be maintained for the periods specified by law or our insurers.

How and where do you store or transfer my personal Data?

All of your data is held online and is processed using various suppliers of "cloud" services, ie for accounting, tax, company secretarial and client management. We also use Google for all email communications and to store/share recent documents.

We confirm with all online services that data is either held within the EU or, if not, that the provider has made specific arrangements to comply with the GDPR.

Data that is no longer needed for the day to day services we are currently providing will be held for two years online and then archived to local (offline) computers and/or hard drives.

Local computers we use to access online services and to access archived data are security and virus protected using suitable software and computer drives are encrypted.

Do you share my personal data?

We undertake to keep your data confidential and only disclose it to people, government agencies or organisations required by law and/or authorised by you, or to those who we employ or contract with, eg the above suppliers or experts we may need to use from time to time. We confirm their compliance with the GDPR.

How can I access my personal data?

If you want to know what personal data we have about you, you can ask us for details and for a copy of it. This is known as a "subject access request".

Unless requested otherwise, data will be provided in electronic format either directly on email, through a secure website service or by link to a shared drive online.

All subject access requests should be made to the email or postal address above.

There is not normally any charge for a subject access request however, if your request is 'manifestly unfounded or excessive' (for example, if you make repetitive requests) a fee may be charged to cover administrative costs.

We will respond to your subject access request within 14 days. In some cases, particularly if your request is more complex, more time may be required up to a maximum of a month from the date we receive your request.

Changes to this Privacy Notice

From time to time we may change this Privacy Notice. This may be necessary, for example, if the law changes, or if we change our business in a way that affects personal data protection.

Any changes will be notified within seven days.