

## Privacy Notice

### What is this document and who is it for?

This document is intended to provide you with important information about how we process your personal data. This includes details of what personal data we hold, how we store it, what we do with it, why we hold it and how long we hold it for.

The contents of this document apply to both clients and prospective clients of Brown Royd Accountants Ltd.

The 'summary information' section below provides some general information about what we do with your personal data. Full details can be found in the table at the end of this notice.

### Summary information

In order to provide you with the services detailed in our letter of engagement Brown Royd Accountants Ltd must hold and process personal data. We use this information to; conduct Customer Due Diligence (CDD) checks we are obliged to conduct under law; meet our obligations detailed under our letter of engagement; and, provide you with any additional services we may agree with you to provide.

We hold your personal data on desktop and cloud-based software, our outlook emails systems, as spreadsheets stored locally on our computers and, in some instances, as physical printouts stored in locked filing cabinets.

### Data Protection Policy

You should read this privacy notice in connection with our data protection policy. A copy of our data protection policy can be requested at any time from us.

### Data controller

Brown Royd Accountants Ltd (Incorporated in England under company number: 08410996).

### How to contact us with any questions

If you would like to contact us, please use the below methods. If your contact relates to exercising your rights under data protection legislation it will help us if you make your communication in writing (either post or email).

**Email:** [accounts@brown-royd.co.uk](mailto:accounts@brown-royd.co.uk)

**Telephone:** 01484 662421

**Registered address:** 41 Church Lane, South Crosland, Huddersfield, HD4 7DD.

## Your rights

Under data protection legislation you have eight main rights relating to your personal data:

1. Right to be informed
2. Right of access
3. Right to rectification
4. Right to erasure
5. Right to restrict processing
6. Right to data portability
7. Right to object
8. Rights related to automated decision making including profiling

For more information on your rights and how we uphold your rights, please visit the Information Commissioner's Office's website ([www.ico.org.uk](http://www.ico.org.uk)) and review our data protection policy, which can be accessed from the relevant sections of our website or can be provided on request.

If at any time you would like to exercise one of your rights under data protection legislation, please contact us. We recommend that you consult our data protection policy before contacting us.

If you would like to make a complaint about our handling of personal data and how we have met our obligations under data protection legislation you can contact the Information Commissioner's Office ([www.ico.org.uk](http://www.ico.org.uk)). Though we would always encourage you to contact us in the first instance so that we can attempt to resolve your complaint.

## Personal data we process for clients

The following table lists the personal data we process, why we process it and how we handle it.

Personal Data	Lawful Basis for Processing	How/Where is the Data Stored?	Who has Access?	How Long the Data is Stored?	Who else is the data transferred to?	Is the data transferred to a third country?	Details of safeguards in place for third countries
<p>Name; Date of birth; Residency; Nationality; National Insurance Number; Unique Taxpayer Reference.</p> <p>Residential address; Business address; Email addresses; Telephone numbers.</p> <p>Bank details; Passport details; Driving licence details; Other forms of personal identification evidence.</p> <p>Employment details; Self employment details; Other sources of income.</p> <p>Company/business registration details and tax identification numbers.</p> <p>PAYE scheme details; VAT registration details; Pension scheme details; Employees' personal data as listed above.</p>	<p>To enable the execution of contract.</p> <p>To enable our legal obligations.</p>	<p>Data is primarily stored locally in an encrypted digital format or using password protection on our firm's computers. Data is also backed up in an encrypted format to the cloud with software provided by UK/EU providers.</p> <p>Password protected cloud based software is used for Money Laundering procedures.</p> <p>Password protected cloud based accounting software is used for the firms accounting records.</p> <p>A secure password protected file sharing facility is also used to share data with clients.</p> <p>Email addresses are stored on password protected cloud based software.</p> <p>From time to time data might be transmitted by email, but password protection is used if deemed appropriate.</p> <p>From time to time data may also be stored in a physical format, this is always locked in a secure environment or destroyed after use.</p>	<p>Directors and employees of Brown Royd Accountants Ltd only.</p>	<p>We will retain data only as long as is necessary to perform our contract with clients or meet our legal obligations. This is normally five years from the date the business relationship ends.</p>	<p>Data is transmitted to HMRC, Companies House and NEST to allow us to fulfil our contract with clients and meet legal obligations.</p> <p>Data is transmitted to our money laundering software supplier to enable us to perform client risk assessments, contractual obligations are in place.</p> <p>Data is transmitted to Equifax for online verification, as required under the MLR 2017, contractual obligations are in place.</p> <p>Data is transmitted to our direct debit processing service provider, contractual obligations are in place.</p> <p>Data may be provided to third parties such as accounting software providers, banks, letting agents and finance brokers at the request of our clients.</p> <p>Data may be provided to the IFA and CPAA who are our independent regulator as part of a QA investigation.</p> <p>Data is always transferred in a secure format.</p>	<p>Mailchimp: USA</p>	<p>MailChimp has certified compliance with the EU-US Privacy Shield.</p>