

## AUKER RHODES ACCOUNTING PRIVACY POLICY

Auker Rhodes Accounting are committed to protecting and respecting the personal data that we hold. This privacy statement describes why and how we collect and use personal data and provides information about individuals' rights. It applies to personal data provided to us, both by individuals themselves or by others on behalf of individuals. We may use personal data provided to us for the purposes described in this privacy statement or as made clear in another form before collecting personal data.

Personal data is any information relating to an identified or identifiable living person. When collecting and using personal data, our policy is to be transparent about why and how we process personal data.

The personal data that is provided to us is provided either directly from the individual concerned, from a third party acting on behalf of an individual, or from publicly available sources (such as internet searches, and Companies House).

### SECURITY

We take the security of all the data we hold seriously. Staff are trained on data protection, confidentiality and security, and we maintain a culture of confidentiality.

We have a framework of policies and procedures which ensure that we keep the data we hold secure.

All information you provide to us is stored on our locally hosted secure servers. Where we have given you (or where you have chosen) a password which enables you to access certain parts of our site, you are responsible for keeping this password confidential. We ask that you do not share your password with anyone.

Unfortunately, the transmission of information via the internet is not completely secure. Although we will do our best to protect your personal data, we cannot guarantee the security of your data transmitted to our site; any transmission is at your own risk. Once we have received your information, we will use strict procedures and security features to try to prevent unauthorised access.

## DATA THAT WE HOLD

### PROFESSIONAL SERVICES

We provide services to individuals as well as businesses and other organisations.

Where we engage with clients for professional services, we may collect and process personal data in order to satisfy a contractual obligation. We request that clients only provide the personal data that is required for us to fulfil our contractual obligation.

Where we are legally permitted to do so, we shall notify our clients if we receive a request for a data subject to exercise their rights under GDPR, or if we are served with information from a supervisory authority.

#### Why do we process data?

Where data is collected for professional services, it is used for a number of purposes, such as;

**Client management.** When communicating with and assessing the needs of clients, personal data may be processed in order to ensure that their needs are appropriately satisfied.

**Administration.** In order to manage and administer our business and services, we may collect and process personal data. This may include (but is not limited to) maintaining internal business records, managing client relationships, administering client facing applications, and maintaining internal operating processes.

**Regulatory.** In order to undertake professional services, we may from time to time be required to collect and process personal data in order to fulfil regulatory, legal or ethical requirements. This may include the verification of identity of individuals.

#### What data is processed?

The data that is processed is dependent on the service that is being provided and on the recipient of this service.

**Services to businesses and other organisations.** We process the personal data of individuals associated with our clients. Personal data may include any relevant financial or non-financial information necessary for us to provide our services. As an example, this may include contact details, payroll data, employee information, lists of shareholders, customers and suppliers and any other specifically relevant data.

**Services to individuals.** Personal data may include contact details and tax identifiers, information about business activities, investments, and other financial interests, payroll and other income, and any other specifically relevant data.

#### How long do we hold data for?

We retain the personal data processed by us in a live environment for as long as is considered necessary for the purpose for which it was collected (including as required by applicable law or regulation, typically 6 years). We may keep data for longer in order to establish, exercise, or defend our legal rights and the legal rights of our clients.

In addition, personal data may be securely archived with restricted access and other appropriate safeguards where there is a need to continue to retain it.

## BUSINESS CONTACTS

Personal data from our contacts, which covers both potential and prior customers, as well as potential and prior employees, are held in a customer relationship management database.

Why do we process data?

Where personal data on business contacts is held, it is used for a number of purposes, such as;

Promotion and development of our services.

Hosting and facilitating of events.

Managing of our relationships.

Administration and management.

What data do we hold?

Personal data that may be stored includes, but is not limited to, name, email address, physical address, job title.

In addition, personal data may be securely archived with restricted access and other appropriate safeguards where there is a need to continue to retain it.

How long do we hold data for?

We retain the personal data processed by us for as long as is considered necessary for the purpose for which it was collected.

## EMPLOYEES

We collect personal data for our employees as part of the administration, management and promotion of our business activities. Our Staff Handbook explains how personal data is held for our staff.

## SUPPLIERS

We collect and process personal data about our suppliers, subcontractors, and the individuals associated with them. The data is held to manage our relationship, to contract and receive services from them, and in some cases to provide professional services to our clients.

Why do we process data?

Receiving goods and services. We process personal data in relation to our suppliers and their staff as necessary to receive the services.

Providing services to our clients. Where a supplier is helping us to deliver professional services to our clients, we process personal data about the individuals involved in providing the services in order to administer and manage our relationship with the supplier and the relevant individuals and to provide such services to our clients.

Administering, managing and developing our businesses and services. We process personal data in order to run our business, including:

managing our relationship with suppliers;

developing our businesses and services, such as identifying client needs and improvements in service delivery;

maintaining and using IT systems;

hosting or facilitating the hosting of events; and

administering and managing our website and systems and applications.

Complying with any requirement of law, regulation or a professional body of which we are a member. We are subject to legal, regulatory and professional obligations. We need to keep certain records to show we comply with those obligations and those records may contain personal data.

What data do we hold?

We hold the data that is necessary for the purposes listed above. As an example, we will typically hold supplier's names, contacts names, and contact details of suppliers.

How long do we hold data for?

We retain the personal data processed by us for as long as is considered necessary for the purpose for which it was collected (including as required by applicable law or regulation). Data may be held for longer periods where required by law or regulation and in order to establish, exercise or defend our legal rights.

## VISITORS

Personal data is collected when individuals visit our offices and sign our visitors book. We have security in place at our offices, for the physical security of client information and for the benefit of our staff.

Why do we process data?

Building access controls may require visitors to our offices to sign in at reception and keep a record of visitors. This is retained in case of theft or other incident and to protect the staff and information in the office.

What data do we hold?

Our visitor book may include name, business, times and car registration.

How long do we hold data for?

Visitor records are accessed on a need to know basis only.

## WEBSITE

When people visit our website, personal data may be collected both through automated tracking and interactions with various forms on the website.

Personal data may also be collected when individuals correspond with us by phone, e-mail or otherwise. This includes information provided when an individual registers to use our website.

When individuals visit our website, certain personal data may be automatically collected.

Why do we process data?

There are a number of reasons why we will process the personal data that an individual may provide to us when visiting our websites. As examples, these include;

**Administration.** In to administer our site and to improve internal operations, including troubleshooting, data analysis, testing, research, statistical and survey purposes. For example, we use this data to ensure that the website is presented well for individuals and is optimised appropriately.

**Functionality.** In order to allow individuals to use some functionality of our website, certain personal data must be entered in order for features to work as intended.

**Security.** In order to keep our site safe and secure, we may sometimes collect personal data, for instance login information and other data that can be used to vouch an individual's identity.

What data do we hold?

The data that we hold depends on what data was entered and for what purpose.

Where data was entered in order to engage with functionality of our website, that personal data may include their name, address, e-mail address and phone number.

Where data is collected automatically, the data that we may collect includes technical information, including the IP address used to connect an individual's computer to the internet, login information, browser type and version, time zone setting, browser plug-in types and versions, operating system and platform;

How long do we hold data for?

We retain the personal data processed by us in a live environment for as long as is considered necessary for the purpose(s) for which it was collected (including as required by applicable law or regulation, typically 6 years).

In addition, personal data may be securely archived with restricted access and other appropriate safeguards where there is a need to continue to retain it.

## SHARING PERSONAL DATA

We will only share personal data with others when we are legally permitted to do so. When we share data with others, we put contractual arrangements and security mechanisms in place to protect the data and to comply with our data protection, confidentiality and security standards.

Personal data held by us may be transferred to:

Third party organisations that provide applications/functionality, data processing or IT services to us. We use third parties to support us in providing our services and to help provide, run and manage our internal IT systems. For example, providers of information technology, cloud based software as a service providers, identity management, website hosting and management, data analysis, data back-up, security and storage services.

Third party organisations that otherwise assist us in providing goods, services or information.

Other professional advisers.

Law enforcement or regulatory agencies or those required by law or regulations.

Occasionally, we may receive requests from third parties with authority to obtain disclosure of personal data, such as to check that we are complying with applicable law and regulation, to investigate an alleged crime or to establish, exercise or defend legal rights. We will only fulfil requests for personal data where we are permitted to do so in accordance with applicable law or regulation.

## LOCATIONS OF PROCESSING

Where possible, personal data resides within the UK territory but may be transferred to, and stored at, a destination outside the European Economic Area (EEA). It may also be processed by staff operating outside the EEA who work for us or for one of our suppliers. We will take all reasonable steps to ensure that your data is treated securely, in accordance with this privacy statement.

We have taken steps to ensure all personal data is provided with adequate protection and that all transfers of personal data outside the EEA are done lawfully. Where we transfer personal data outside of the EEA to a country not determined by the European Commission as providing an adequate level of protection for personal data, the transfers will be under an agreement which covers the EU requirements for the transfer of personal data outside the EU.

## INDIVIDUAL'S RIGHTS

Individuals have certain rights over their personal data and data controllers are responsible for fulfilling these rights as follows:

Individuals may request access to their personal data held by us as a data controller.

Individuals may request us to rectify personal data submitted to us or, where appropriate, contact us via the relevant website registration page or by amending the personal details held on relevant applications with which they registered.

Individuals may request that we erase their personal data

Where we process personal data based on consent, individuals may withdraw their consent at any time by contacting us or clicking on the unsubscribe link in an email received from us.

Individuals may have other rights to restrict or object to our processing of personal data and the right to data portability.

Individuals may request information about, or for human intervention into, any automated data processing that we may undertake.

If you wish to exercise any of these rights, please contact us at [dataprivacy@aukerrhodesaccounting.co.uk](mailto:dataprivacy@aukerrhodesaccounting.co.uk)

## COMPLAINTS

If you wish to complain about our use of personal data, please send an email with the details of your complaint to [dataprivacy@aukerrhodesaccounting.co.uk](mailto:dataprivacy@aukerrhodesaccounting.co.uk). We will look into and respond to any complaints we receive.

You also have the right to lodge a complaint with the UK data protection regulator, the Information Commissioner's Office ("ICO"). For further information on your rights and how to complain to the ICO, please refer to the ICO website <https://ico.org.uk/concerns>

## DATA CONTROLLER AND CONTACT INFORMATION

The data controller for Auker Rhodes Accounting is Auker Rhodes Accounting Ltd, registered office Devonshire House, 32-34 North Parade, Bradford, BD1 3HZ.

If you have any questions about this privacy statement or how and why we process personal data, please contact us at:

Auker Rhodes Accounting Ltd  
Devonshire House  
32-34 North Parade  
Bradford  
BD1 3HZ  
Email: [dataprivacy@aukerrhodesaccounting.co.uk](mailto:dataprivacy@aukerrhodesaccounting.co.uk)  
Phone: 01274 299 499

## UPDATES TO OUR PRIVACY STATEMENT

Updates will appear on our website.

This privacy statement was last updated on 24th May 2018.