

## CLIENT PRIVACY NOTICE

### **Who are we and what are our contact details?**

Marsland Nash Associates Ltd  
Chartered Tax Advisers, Accountants and Business Consultants

Office:-

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General Data Protection Representative: Zohan Nash

### **What is the purpose of this notice?**

To describe how we collect and use personal data about you. We are committed to protecting your personal data in accordance with the Data Protection Act 2018 (DPA 2018) and the General Data Protection Regulation (GDPR).

We take the security of your data we hold seriously. We have a policy including procedures and training in place covering data protection, confidentiality and security and regularly review the appropriateness of the measures we have in place to keep the data we hold secure.

### **What data we need**

Marsland Nash Associates Ltd will be what's known as the "Controller" of the personal data you provide to us. We only collect basic personal data about you which does not include any special categories of personal information about you (known as Special Category Data).

Our policy is to collect only the personal data necessary for agreed purposes enabling us to perform the services we are engaged to perform, and we ask clients to only share personal data where it is strictly needed for those purposes. We collect personal data from our clients or from third parties acting on the instructions of the relevant client.

### **What are our purposes of processing the data**

We process personal data to provide professional services such as tax advice, accounting advice and general or specific business advice as part of the range of services we offer. We also process personal data in the administration and management of our business. We will not collect any personal data from you we do not need to provide and oversee these services to you.

### **What are the reasons we hold the data, what is our legal basis**

We process personal data for several purposes and the means of collection, lawful basis of processing, use, disclosure, and retention periods for each purpose may differ.

We are subject to legal, regulatory and professional obligations. We need to keep certain records to demonstrate that our services are provided in compliance with those obligations and those records may contain personal data.

For our main services we use your personal data:

- to take steps to enter into, or perform, a contract with you; or
- to comply with a legal obligation

In any event, we'll only use your information for the purpose or purposes it was collected for (or for closely related purposes).

### **Where do we keep the data and who do we share it with**

We are based in the UK and we store our data within the EU. Some organisations which provide services to us may transfer personal data outside of the EU, but we will only allow them to do this if your data is adequately protected.

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 your data. Examples are our accounting software packages, our cloud backup provider and our IT support company.

We use third parties located in other countries to help us run our business. As a result, personal data may be transferred outside the countries where we and our clients are located. This includes countries outside the European Union ("EU"). For example, some of our systems use Microsoft products. As a US company, it may be that using their products result in personal data being transferred to or accessible from the US. However, we will allow this as we are certain personal data will still be adequately protected (as Microsoft is certified under the USA's Privacy Shield scheme).

### **How long we keep the data**

We will only use and store information for so long as it is required for the purposes it was collected for. How long information will be stored depends on the information in question and what it is being used for. For example, if you ask us not to send you marketing e-mails, we will stop storing your e-mails for marketing purposes (though we'll keep a record of your preference not to be e-mailed).

We continually review what information we hold and delete what is no longer required. We never store payment card information.

Personal data processed is kept 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). In the absence of specific legal, regulatory or contractual requirements, our retention policy period for records and other documentary evidence created in the provision of services is 7 years.

### **How we would like to use your data for marketing purposes**

We would, however, like to use your name, business contact details and e-mail address to send you our regular newsletter and also inform you of any events or services which we think may be of interest to you. This information is not shared with third parties and you can unsubscribe at any time via phone or e-mail. We will give you the option to unsubscribe when you first become a client, and also any email for this purpose will include the option to unsubscribe.

### **What are your rights?**

Under the DPA (2018) and GDPR, individuals have certain rights over their personal data and data controllers are responsible for fulfilling these rights. If you wish to exercise any of these rights, or for further information on any of these rights, please contact us using the details at the beginning of this notice.

#### The right to be informed

This Privacy Notice fulfils this right.

#### The right of access to data

You have a right to confirmation as to whether we have your personal data and, if we do, to access a copy of the personal information we hold (this is known as a data subject access request). Our aim is to respond to a request promptly and within the legally required limit of one month. Can be extended by a further two months if complex. No fee will be charged.

#### The right to rectification

You have a right to have personal data submitted to us updated, or have inaccurate data rectified. Once we are informed that any personal data held by us is no longer accurate we will make changes based on your updated information.

#### The right to be forgotten

You have a right to have your data erased and to prevent processing. Please note that this is not an absolute right, and applies in specific circumstances. It will not apply where it is necessary for us to continue to use the data for a lawful reason.

#### The right to restrict processing

In certain circumstances you have a right to stop us processing your data even though we still hold it. For example where you contest its accuracy. Full details upon request.

#### The right to object to processing

In certain circumstances you can object to us processing your data. For example for direct marketing or profiling. Full details upon request.

#### The right to data portability

You have a right to ask us to send your data to a third party in a commonly used format.

#### Rights in relation to automated decision making and profiling

You have a right to object to significant decision being made solely by automated means, including profiling.

Please keep in mind that there are exceptions to the rights above and, though we will always try to respond to your satisfaction, there may be situations where we are unable to do so.

#### **Complaints**

If you do want to complain about our use of your personal data, please contact us using the details at the beginning of this notice, with the details of your complaint. If you are not satisfied with our response or believe we are processing your personal data not in accordance with the law you can complain to the Information Commissioner's Office ("ICO"), the UK supervisory authority for data protection issues. For further information on your rights and how to complain to the ICO, please refer to their website.