

Mary T Marsh FCA GDPR Privacy Statement

Background: I understand that your privacy is important to you and that you care about how your personal data is used. I respect and value the privacy of all my clients and will only collect and use personal data in ways that are described here and in a way that is consistent with my obligations and your rights under the law.

1. Information About Me

Mary T Marsh FCA is an accountancy and tax advisory firm registered with and subject to the Code of Ethics of the Institute of Chartered Accountants in England and Wales (ICAEW).

ICAEW firm No :	C006124471
Data Protection Officer :	Mary Marsh.
ICO Data Protection Ref :	A8391887
Email address :	mary@mtmarsh.co.uk
Telephone numbers :	0794 167 4936 or 01684 575803

2. What Does This Notice Cover?

This Privacy Information explains how I 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.

3. 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'.

In simpler terms personal data is any information about you that enables you to be identified. Personal data covers obvious information such as your name and contact details, but it also covers less obvious information such as identification numbers, electronic location data, and other online identifiers. The personal data that I use is set out in Paragraph 5, below.

4. What Are My Rights?

Under the GDPR, you have the following rights, which I will always work to uphold:

1. The right to be informed about my collection and use of your personal data. This Privacy Notice should tell you everything you need to know, but you can always contact me to find out more or to ask any questions using the details in Paragraph 12.
2. The right to access the personal data I hold about you. Paragraph 10 will tell you how to do this.
3. The right to have your personal data rectified if any of your personal data held by me is inaccurate or incomplete.
4. The right to be forgotten, i.e. the right to ask me to delete or otherwise dispose of any of your personal data that I have.
5. The right to restrict (i.e. prevent) the processing of all or part of your personal data.
6. The right to object to me using your personal data for a particular purpose or purposes.
7. The right to data portability: This means that if you have provided personal data to me directly, I am using it with your consent or for the performance of a contract, and that data

is processed using automated means, you can ask me for a copy of that personal data to re-use with another service or business.

8. Rights relating to automated decision-making and profiling: I do not use your personal data in this way.

It is essential that you notify me of any changes to your personal data in order that I can maintain accurate records on your behalf.

Further information about your rights can also be obtained from the Information Commissioner's Office or your local Citizens Advice Bureau. If you have any cause for complaint about my use of your personal data, you have the right to lodge a complaint with the Information Commissioner's Office. See Paragraph 12.

5. What Personal Data Do I Collect?

I may collect some or all of the following personal data (this may vary according to the services which I provide to you):

- Name
- Home address
- Telephone numbers – landline and mobile
- Email addresses
- Photographic ID
- IP address
- Date of birth
- Personal Tax references
- Details of contact I have had with you in relation to the provision or proposed provision of services
- Details of any services you have received from me
- My correspondence and communications with you by whatever means
- Information about any complaints and enquiries you make to me
- Information from research, surveys and marketing activities
- Information received from other sources such as publicly available information and information provided by an employer.

6. How Do You Use My Personal Data?

Under the GDPR, I must always have a lawful basis for using personal data. This may be because the data is necessary for the performance of my contract with you or because it is in my legitimate business interests to use it. Your personal data may be used for one of the following purposes:

- Supplying my services to you as agreed in my engagement letter and associated schedules.
- Personalising and tailoring my services to you.
- Communicating with you in response to emails, letters or calls from you.
- For the purposes of my own legitimate interests provided that they do not override any of your own interests, rights or freedoms which require the protection of personal data. This includes processing for marketing, business development, statistical analysis and management purposes.

I will always work to fully protect your rights and comply with my obligations under the GDPR and the Privacy and Electronic Communications (EC Directive) Regulations 2003.

7. How Long Will You Keep My Personal Data?

I will not keep your personal data for any longer than is necessary in light of the reason(s) for which it was first collected.

When assessing an appropriate retention period for your personal data I will take the following points into consideration:

- The requirements of my business and the services provided to you
- The lawful grounds on which I based my processing
- Any statutory or legal obligations
- The type and amount of personal data and the purpose for which it was originally collected.

8. How, Where and To Where Do You Store or Transfer My Personal Data?

I will only store your personal data in the UK or elsewhere in the EU. This means that it will be fully protected under the GDPR.

There may be circumstances where it is appropriate to transfer your personal data to countries outside of the EU in order to perform my contact with you. By submitting your personal data, you agree to this transfer and I will take all reasonable steps necessary to ensure that your data is treated securely and in accordance with this privacy policy.

I have taken all commercially reasonable and appropriate measures to prevent your personal data from being accidentally lost, used or accessed in an unauthorised way, altered or disclosed.

Please note that transmission of information via the internet is not completely secure. Although I will do my best to protect your personal data, I cannot guarantee the security of data transmitted to me and any such transmission is at your own risk. However, once obtained, your data however received will be stored as securely as is reasonably possible.

Your data will be deleted once I no longer have a relevant use for it and/or it has passed the relevant expiry date.

9. Do You Share My Personal Data?

I will share your personal data with third parties where I am required by law to do so; where it is necessary to administer the relationship between us or where I have other legitimate interest in doing so.

Third parties include IT and cloud services, professional advisory services, administration services, marketing services and banking services. All such third parties are required to take commercially reasonable and appropriate security measures to protect your personal data. I will only permit third party providers to process your personal data for specific purposes and in accordance with my instructions.

I may share your personal data with other third parties, for example in the context of the possible sale or restructuring of my business. I may also need to share your data with a regulator or otherwise to comply with the law.

10. How Can I Access My Personal Data?

If you want to know what personal data I have about you, you can ask me for details of that personal data and for a copy of it (where any such personal data is held). This is known as a “subject access request”.

All subject access requests should be made in writing and sent to the email or postal address shown in Paragraph 12.

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

I will respond to your subject access request within one month. Normally, I aim to provide a complete response, including a copy of your personal data within that time. In some cases, however, particularly if your request is more complex, more time may be required up to a maximum of three months from the date I receive your request. You will be kept fully informed of my progress.

11. Changes to this Privacy Notice

I may change this Privacy Notice from time to time. This may be necessary, for example, if the law changes, or if I change my business in a way that affects personal data protection. Any changes will be notified to you and made available on my website.

This privacy notice was last updated on 1st October 2018

12. How Do I Contact You?

To contact me about anything to do with your personal data and data protection, including to make a subject access request, please use the following details :

Email address : mary@mtmarsh.co.uk

Telephone number : 0794 167 4936 or 01684 575803

Postal Address : 42 Alexandra Road, Malvern, Worcestershire WR14 1HF

You also have the right to make a complaint to the Information Commissioner’s Office (ICO), the UK supervisory authority for data protection issues. Their contact details are as follows :

Information Commissioner’s Office
Wycliffe House
Water Lane
Wilmslow
Cheshire
SK9 5AF

Telephone : 0303 123 1113

Website – <https://ico.org.uk/concerns>

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