

JMB Accounting Ltd

Privacy Policy

We are committed to protecting the privacy and security of all personal data that we hold about you to ensure compliance with the General Data Protection Regulation (“GDPR”), previously the Data Protection Act 1998 and any other national implementing laws, regulations and secondary legislation, as amended or updated from time to time, in the UK.

This privacy notice was last updated on 16th May 2018. Any further amendments that we may make in the future will be either be communicated directly to you or will be updated on our website.

1. About Us

JMB Accounting Ltd (‘JMB’) is an accountancy and tax advisory firm providing services to both individuals and businesses. We are a limited company registered in England and Wales with the company number 07049368. Our registered office is at 10 London Road, Liphook, Hampshire, GU30 7AN which is our trading address and the primary location for our work.

2. Collecting your data

To enable us to perform our services, we obtain personal data about you. Examples of when we might do this include:

- When you contact us regarding the provision of a service to you, your employer or our clients so we may provide a package and quote for our services,
- When we verify your identity to ensure compliance with money laundering requirements,
- When we contact previous advisers for hand over information required for the provision of our services as agreed by you,
- When your employer engages us for the provision of a service(s) such as payroll and during such provision,
- When you or our clients engage us for the provision of a service(s) and during such provision,
- From 3rd parties and/or publicly available sources such as Companies House, HMRC etc

3. What Data do we hold

The information we hold about you may include the following:

- Your personal details (such as your name, address, date of birth, email etc)
- Your personal tax details (such as your National insurance number and Self Assessment Unique Tax Reference)
- Prior tax returns completed by previous advisers
- Salary details and details of holiday taken, sickness absence and maternity leave for the purposes of payroll processing
- Correspondence with you, your employer or our clients where appropriate
- Details of the services we provide and have provided to you
- Data we receive from you, your employer or our clients in the provision of services
- Information that we receive from other sources such as that which is publicly available at Companies House

4. Data Protection Point of Contact

We have appointed a data protection manager who is our Data Protection Point of Contact. This person's responsibilities include assisting with any enquiries regarding this privacy notice, requests to exercise rights under GDPR including changes to personal data and access to data.

The data protection manager can be emailed on info@jmbaccounting.co.uk or can be contacted on the main office number 01428 727313. JMB will take all such communication seriously and will acknowledge receipt in the first instance. Where this has not been received, please contact us again to ensure that your communication has been received.

5. What we use your Personal Data for

We only hold your personal data for purposes necessary for fulfilling our contractual obligations in the provision of a service(s) to you, your employer, our clients and to comply with our legal obligations. This may arise in situations where you are an employee, customer, supplier or contractor of our client and is necessary for the performance of such contracts.

We may also contact you requesting a feedback on the quality of our services.

We will only hold your data where we have a legitimate reason for holding and processing it and for the purposes of our own legitimate interests, provided that those interests do not override any of your own interests, rights and freedoms which require the protection of personal data. We may have more than one reason for holding and processing your data.

In situations where we are only allowed to process the data on receipt of your expressed permission, we will seek your consent explaining how and why we are using the data. You will then have the right to withdraw such consent at any time.

Should the purpose for which we hold your data change at any point, we will only continue to store or process the data where the reason is compatible with the original reason for which the data was collected. Where this is not the case, we will contact you informing you of this, seeking consent when and if necessary.

6. Your data security and our staff

We have commercially reasonable and appropriate security measures in place to prevent a breach of security leading to the accidental or unlawful destruction, loss, alteration, unauthorised disclosure of, or access to, personal data transmitted, or otherwise processed.

Your electronic data is only accessible by authorised staff who each have a unique login and password to our computer system. Hardcopy data is stored securely with only authorised staff having access to this.

Each member of staff is trained in data protection, has a duty of confidentiality and is aware of their own personal responsibilities regarding the data we hold about you, our clients or suppliers and customers of our clients. There are clear working policies in place to reduce the risk of data breaches including procedures to follow should the unlikely event of a breach occur.

7. Where we do not have sufficient/accurate data

If a situation arises whereby we are not able to provide our services or meet our legal obligations due to a lack of data or incorrect data from, or where refusal to provide information has been received from you, your employer or our clients, we will review our position and we retain the right to cease provision of our services with immediate effect.

You also have a duty to ensure that we are aware of any changes to the data that we hold about you to ensure that it is accurate. Where any amendments need to be made, these can be communicated to our data protection manager or your appropriate contact at JMB.

8. How long we hold the data for

We will only retain your personal data for as long as is necessary to fulfil the purposes for which it is collected unless we have other overriding statutory or legal reason to do so. Due to the accountancy, payroll and taxation services we provide, we are legally required to keep certain records by HM Revenue and Customs and Companies House.

We have policies in place to ensure that we do not hold the data for longer than we are required to do so and where this data is archived, the data will be kept secure until we no longer have a legitimate reason to keep it, whereby it will be confidentially destroyed.

9. Your rights

Under GDPR, you have rights in relation to the data that is held about you. These are:

- Right to be informed whereby we let you know why we hold your data, for how long and with whom and is generally performed as part of our engagement
- Right of access whereby you can access the data that we hold about you and check that we are processing this lawfully
- Right to rectification whereby you can correct the personal data we hold about you where it is found to be inaccurate or incomplete
- Right to erasure enabling you to request the information that we hold about you to be deleted where we have no legitimate reason to hold it whether as a result of a cessation of our contract with you or other legal obligation
- Right to restrict processing in certain circumstances
- Right to data portability ensuring you receive data from us in a format that is readable to you
- Right to object to the processing of your data in certain circumstances which is particularly relevant where marketing is involved
- Rights regarding automated decision making and profiling which is not a process that we currently perform

Should you wish to exercise any of the above rights, please email our data protection manager on info@jmbaccounting.co.uk or call 01428 727313. There is no fee to access your personal data provided your request is not excessive.

In the majority of cases, we hold your data to perform our contractual services to you. Where we

are required to receive your consent for additional services such as marketing, you have the right to withdraw your consent at any time.

10. Data sharing

To enable us to fulfil the services with you, your employer or our client, we use 3rd party providers for certain services.

These include our 3rd party service providers of IT technical support, IT cloud based services, IT software providers, payroll service providers, pension providers and professional advisory services.

We will only share the data necessary to provide the services that we are contracted to do and will only permit our 3rd party service providers to process the data for the reason that we have contracted and instructed them to do so and for no other reason. We also require that our 3rd party services providers are GDPR compliant and take the security of the data that they hold seriously, implementing the necessary security measures as required.

Data transferred to 3rd party service providers will be no more than required and will be transferred via secure means.

We may also be required by law to share personal data with other 3rd party parties and where appropriate we will inform you of such situations.

We will not transfer your data outside of the European Economic Area (EEA).

11. Information Commissioner's Office

You have the right to make a complaint regarding JMB and the data we hold and process to the Information Commissioner's office (ICO), the UK supervisory authority. Their website www.ico.org.uk gives details as to how best to raise this complaint using online means.

Alternatively, you can contact them using the following:

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

Telephone: 0303 123 1113 (local rate), or 01625 545 745 (national rate)

We will also report to the ICO of a suspected breach where we are legally required to do so.

12. Questions

If you have any queries regarding the content of this privacy policy or in relation to the data we hold and our responsibilities under GDPR, please email our data protection manager on info@jmbaccounting.co.uk or alternatively call our office on 01428 727313.