

OUR PRIVACY POLICY

Vale Accountants are committed to protecting the privacy of our clients.

This policy, together with our Terms of Engagement, sets out the basis upon which we process personal information about you.

What is personal data?

Personal data, as defined in the General Data Protection Regulation ("GDPR"), includes the following information:

- Your name;
- Your address;
- Your email;
- Your phone number;
- Your payment or bank details;
- Your date of birth;
- Your national insurance number;
- Your Tax Reference Number
- Any other relevant data you provide us.

When will you use my personal data?

In accordance with the GDPR, we may use your personal data if:

- You consent to us doing so;
- It is necessary for the performance of our contract with you to act as your accountant;
- To provide you with quotations for providing you with our services;
- It is necessary to comply with a legal obligation;
- It protects your vital interests or the vital interests of another person;
- It is necessary for the performance of a task carried out in the public interest or in the exercise of official authority vested in the controller;
- It is in the legitimate interests of our business, or a third party, except where such interests are overridden by your interests, rights or freedoms.

In the majority of instances, we will use your data to enable us to fulfil our contract with you to act as your accountant.

How will you use my personal data?

In order for us to progress your case and to comply with our legal obligations, it may be necessary for us to retain and supply the personal information which you have given us to various external parties. These may include, but are not limited to:

- Third parties engaged in the course of our work on your behalf (such as bookkeepers, employers, banks, payroll providers, solicitors, stockbrokers, financial advisers, insurance companies);
- HM Revenue and Customs;
- Financial Conduct Authority;
- Government or regulatory authorities;
- Our professional advisors (to include our financial advisers and solicitors);
- Our professional indemnity and other relevant insurers.

We may be required to provide your information to our professional indemnity insurer in the event that a claim is made against us.

We will also use your information if we are under a duty to disclose or share your personal data in order to comply with any legal obligation, or in order to enforce or apply our Terms of Engagement and other agreements; or to protect the rights, property, or safety of Vale Accountants, our clients, or others. This includes exchanging information with other companies and organisations for the purposes of fraud protection and credit risk reduction.

Marketing

We will request your express consent to use your data to contact you about services and/or events we feel may be relevant and to provide suggestions and recommendations based on the information provided to us. This consent can be withdrawn at any time by notifying the Practice Principal in writing at Vale Accountants, 11 Thorndale Terrace, Ballymoney BT53 7AZ

We will not sell or otherwise release your personal data to third parties for marketing purposes.

Our website

We are committed to ensuring that the privacy of those who use our website (www.valeaccountants.co.uk) is protected. We may collect information from you in the course of your use of our website or your submission of requests to us. The personal information collected may be used to enable us to contact you or to provide you with information you have requested (such as quotations or details of services we offer). By using our website, you consent to the collection and use of your personal information as described in this paragraph.

Where will you store my data and is it safe?

All information you provide to us is stored on our secure server which is password protected.

Any payment transactions will be encrypted before electronic transfer.

Our website may, from time to time, contain links to and from other websites. If you follow a link to any of these websites, please note that these websites have their own privacy policies and that we do not accept responsibility or liability for these policies. Please check these policies before you submit any personal data to these websites, which may differ from ours

How long will you keep my data for?

We will retain your data only for as long as is necessary to:

- Carry out work for which we have been instructed;
- Establish or defend legal claims that could be made against us;
- Comply with legal obligations and obligations imposed by the authorities of the United Kingdom.

Typically, we store information for seven years from the date of your final bill, following which, it is destroyed.

Can I access my data?

You are entitled to make a Subject Access Request to obtain details of the information that we hold on you. In some instances, we may charge an administration fee.

Updating your data

Please let us know if your personal information is inaccurate or has changed by notifying the Practice Principal in writing at Vale Accountants, 11 Thorndale Terrace, Ballymoney BT53 7AZ

Contact Us

Questions, comments and requests regarding this privacy policy should be directed to the Practice Principal in writing at Vale Accountants, 11 Thorndale Terrace, Ballymoney BT53 7AZ

Further information

For further information on your privacy rights, please visit the Information Commissioner's Office website at <https://ico.org.uk/your-data-matters>.

Please be advised that we review and edit this policy from time to time. Changes will be posted on this page.