

## Privacy Policy (May 2018)

### Who We Are

Plunkett Yates Limited gather and process your personal information in accordance with this privacy policy and in compliance with the relevant data protection Regulation and laws. This notice provides you with the necessary information regarding your rights and our obligations, and explains how, why and when we process your personal data.

Plunkett Yates Ltd's registered office is at 7 Southernhay West, Exeter, EX1 1JG and we are a company registered in England and Wales under company number 07360885. We are registered on the Information Commissioner's Office Register; registration number ZA235401 and act as the data controller when processing your data. Our designated Data Protection Officer/Appointed Person is Brian Yates, who can be contacted at the registered office on 01392 247444 or by email at [brian@plunkett-yates.co.uk](mailto:brian@plunkett-yates.co.uk).

### Information That We Collect

Plunkett Yates Limited processes your personal information to meet our legal, statutory and contractual obligations and to provide you with our services. We will never collect any unnecessary personal data from you and do not process your information in any way, other than as specified in this notice.

The personal data that we collect in connection with all of our services includes (where applicable/available/relevant):-

- Name
- Date of Birth
- Home Address
- Personal Email
- Business Email
- Home Telephone Number
- Mobile Telephone Number
- National Insurance Number
- Unique Tax Reference Number
- Passport Number (when relevant)
- Driver's License Number (when relevant)

We collect information in the following ways: -

- From you, directly as our client.
- From third parties who may consider that our services would be of benefit to you.
- From HM Revenue and Customs and Companies House

## **How We Use Your Personal Data**

Plunkett Yates Limited takes your privacy very seriously and will never disclose or share your data without your consent; unless required to do so by law. We only retain your data for as long as is necessary and for the purposes specified in this notice. The purposes and reasons for processing your personal data are detailed below: -

- We collect your personal data in order to perform our contractual service as accountants and tax advisors and to ensure that we can contact you.
- We will occasionally use the information to send you information on services where we have assessed that it is beneficial to you as a client.

## **Your Rights**

You have the right to access any personal information that Plunkett Yates Limited processes about you and to request information about: -

- What personal data we hold about you
- The purposes of the processing
- The categories of personal data concerned
- The recipients to whom the personal data has/will be disclosed
- How long we intend to store your personal data for
- If we did not collect the data directly from you, information about the source

If you believe that we hold any incomplete or inaccurate data about you, you have the right to ask us to correct and/or complete the information and we will strive to do so as quickly as possible; unless there is a valid reason for not doing so, at which point you will be notified.

You also have the right to request erasure of your personal data or to restrict processing (*where applicable*) in accordance with the data protection laws; as well as to object to any direct marketing from us. Where applicable, you have the right to data portability of your information and the right to be informed about any automated decision-making we may use.

If we receive a request from you to exercise any of the above rights, we may ask you to verify your identity before acting on the request; this is to ensure that your data is protected and kept secure.

## **Sharing and Disclosing Your Personal Information**

We do not share or disclose any of your personal information without your consent unless there is a legal requirement.

## **Safeguarding Measures**

Plunkett Yates Limited takes your privacy seriously and takes every reasonable measure and precaution to protect and secure your personal data. We work hard to protect you and your information from unauthorised access, alteration, disclosure or destruction and have appropriate security measures in place.



The personal information that we hold is stored on third party servers which are hosted in the UK and the EU. The provider of this service has constructed their own data centres to ensure the necessary level of protection and security and they comply with the relevant data protection laws. No personal data is stored outside the EU.

If you would like further information about the storage of data and security measures in place, please contact our Data Protection Officer at the address below.

### **Consequences of Not Providing Your Data**

You are not obligated to provide your personal information to Plunkett Yates Limited, however, as this information is required for us to provide you with our services, we will not be able to offer any of our services without it.

### **How Long We Keep Your Data**

Plunkett Yates Limited only ever retains personal information for as long as is necessary and we have strict review and retention policies in place to meet these obligations. We are required under UK tax law to keep your basic personal data (*name, address, contact details*) for a minimum of 6 years after which time it will be destroyed.

### **Marketing**

Plunkett Yates Limited may occasionally send you details of services by email or post that have been identified as being beneficial to our clients and in our interests. Such information will be relevant to you as a client and is non-intrusive and you will always have the option to opt-out/unsubscribe at any time.

If you would prefer not to receive the above-mentioned marketing, please let your personal contact at Plunkett Yates know by email or telephone call.

### **Lodging A Complaint**

Plunkett Yates Limited only processes your personal information in compliance with this privacy notice and in accordance with the relevant data protection laws. If, however you wish to raise a complaint regarding the processing of your personal data or are unsatisfied with how we have handled your information, you have the right to lodge a complaint with the supervisory authority.

#### **Plunkett Yates Limited**

**Data Protection Officer: Brian Yates**

**7 Southernhay West, Exeter, EX1 1JG**

**Email: [brian@plunkett-yates.co.uk](mailto:brian@plunkett-yates.co.uk)**

**Telephone number: 01392 247444**

#### **Supervisory Authority**

**Information Commissioners Office**

**Contact details can be found at [www.ico.org.uk](http://www.ico.org.uk)**

**Telephone number: 0303 123 1113**

Plunkett Yates Limited is a company registered in England with number 7360885. The company's registered office is 7 Southernhay West, Exeter, Devon, EX1 1JG. The proprietors of the company are Richard Plunkett FCCA and Brian Yates FCCA.

Members of the Chartered Institute of Certified Accountants.