

Goldwyns (Bristol) Limited
Privacy Notice

Goldwyns (Bristol) Limited is committed to the security of your personal data and takes the protection of your privacy very seriously. We will only use your personal information to deliver the services you have requested from us, and to meet our legal responsibilities. This privacy notice explains the data we need and how we will use it.

How we collect information from you

We obtain information about you when you engage us to deliver our services. This may be from you directly, or we may request certain information from former accountants/advisers or when you use our website. From time to time, we may also obtain information about you from other third parties when delivering the services that we have agreed.

What type of information we collect from you

The personal information that we collect from you will vary depending upon which services you engage us to deliver. The personal information we might collect includes your name, address, telephone number, email address, your Unique Tax Reference (UTR) number, your National Insurance number, date of birth, bank account details, your IP address, together with which pages you may have visited on our website and when you have accessed them.

How your information is used

Depending upon which services you engage us to deliver, as part of providing our agreed services, we may use your information to:

- Communicate with you by post, email, telephone or by Fax.
- Verify your identity and home address for money laundering purposes.
- Prepare and submit to HMRC annual tax return forms and other forms as and when required.
- Liaise with HMRC in relation to your affairs.
- Prepare monthly payroll on behalf of your organisation and individual employee's
- Liaise with certain 3rd parties, i.e. NEST, Peoples Pension, HMRC etc.
- Provide advice to help mitigate your tax liabilities
- Understand your needs and how they may be met
- Process financial transactions
- Prepare and submit forms to Companies House
- Prevent and detect crime, fraud or corruption

We are required by legislation, other regulatory requirements and our insurers to retain your data where we have ceased to act for you. The period of retention varies with the applicable legislation but is typically five or six years. To ensure compliance with all such requirements it is the policy of the firm to retain all data for a period of six years from the end of the period concerned.

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Who has access to your information

We will not sell or rent your information to third parties.

We will not share your information with third parties for marketing purposes.

Any staff with access to your information have a duty of confidentiality under the ethical standards that this firm is required to follow.

Third Party Service Providers working on your behalf

We may pass your information to our third party services providers, and other associated organisations for the purposes of completing tasks and providing services to you on our behalf, for example basic bookkeeping, payroll (auto-enrolment), financial advisors, Inland Revenue Tax Investigation Insurers etc. However, when we use third party service providers, we disclose only the personal information that is necessary to deliver the service and we have a contract in place that requires them to keep your information secure and not to use it for their own purposes.

Please be assured that we will not release your information to third parties unless you have requested that we do so, or we are required to do so by law, for example, by a court order or for the purposes of prevention and detection of crime, fraud or corruption.

How you can access and update your information

Keeping your information up to date and accurate is important to us. We commit to regularly review and correct where necessary, the information that we hold about you. If any of your information changes, please email, write to us or call us using the contact information given later in this notice.

You have the right to ask for a copy of the information Goldwyns (Bristol) Limited holds about you.

Security precautions in place to protect the loss, misuse or alteration of your information

Whilst we strive to protect your personal information, we cannot guarantee the security of any information you transmit to us and you do so at your own risk.

Once we receive your information, we make our best effort to ensure its security on our systems. Where we have given, or where you have chosen, a password which enables you to access information, you are responsible for keeping this password confidential. We ask you not to share your password with anyone.

Your data will usually be processed in our office in the UK. However, to allow us to operate efficient digital processes, we sometimes need to store information in servers located outside the UK, but within the European Economic Area (EEA). We take the security of your data seriously and so all our systems have appropriate security in place that complies with all applicable legislative and regulatory requirements.

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Your choices

We may occasionally contact you by post, email and/or telephone with details of any changes in legal and regulatory requirements or other developments that may be relevant to your affairs and, where applicable, how we may assist you further. If you do not wish to receive such information from us, please let us know by contacting us as indicated under the contact information given later in this notice.

Your rights:

Access to your information

You have the right to request a copy of the personal information about you that we hold.

Correcting your information

We want to make sure that your personal information is accurate, complete and up to date. You may ask us to correct any personal information about you that you believe does not meet these standards.

Deletion of your information

You have the right to ask us to delete personal information about you where:

- You consider that we no longer require the information for the purposes for which it was obtained
- You have validly objected to our use of your personal information – see “objecting to how we may use your information” below
- Our use of your personal information is contrary to law or our other legal obligations

Restricting how we may use your information

In some cases, you may ask us to restrict how we use your personal information. This right might apply, for example, where we are checking the accuracy of personal information about you that we hold or assessing the validity of any objection you have made to our use of your information. The right might also apply where there is no longer a basis for us using your personal information but you do not want us to delete the data. Where this right is validly exercised, we may only use the relevant personal information with your consent, for legal claims or where there are other public interest grounds to do so.

Objecting to how we may use your information

Where we use your personal information to perform tasks carried out in the public interest, then, if you ask us to, we will stop using that personal information unless there are overriding legitimate grounds to continue.

Please contact us in any of the ways set out in the “contact information” below if you wish to exercise any of these rights.

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Changes to our privacy notice

We keep this privacy notice under regular review. A copy of this privacy notice (including any updates) can be found on our website at www.goldwyns-bristol.co.uk. Paper copies of the privacy notice may also be obtained on request.

Contact information:

Please contact **Clive Barron** at:-

Goldwyns (Bristol) Limited, 9 Portland Square, Bristol, BS2 8ST

Telephone:- 0117 923 2080

Email:- Clive.barron@goldwyns-bristol.co.uk