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Privacy policy of Undershot Ltd practising as Peter Brown & Co and Peter Brown FCCA,FCIE as a sole practitioner

We collect certain information or data about you when you use our website or when we collate and record information you send us by post, email or telephone.

Web based information

We, or our internet service providers, collect:

- questions, queries or feedback you leave, including your email address if you contact www.fabtax.co.uk or contact us by email
- your email address .
- your IP address, and details of which version of web browser you used
- information on how you use the site, using cookies and page tagging techniques
- with your permission, details about your business, financial or taxation affairs to enable us to provide you with professional services in accordance with a pre agreed letter of engagement
- with your permission, identity details to comply with legal and professional rules and to enable us to provide you with professional services in accordance with a pre agreed letter of engagement

This data can be viewed by authorised people in our firm and our internet service suppliers, to:

- improve the site by monitoring how you use it
- gather feedback to improve our services
- respond to any feedback you send us, if you've asked us to
- send email alerts to users who request them
- provide you with information about our services if you want it
- to enable us to comply with Money Laundering and Anti Terrorism legislation and to enable us to provide you with professional services in accordance with a pre agreed letter of engagement

Information supplied by post, email or telephone

We collect:

- with your permission, details about your business, financial or taxation affairs to enable us to provide you with professional services in accordance with a pre agreed letter of engagement
- with your permission, identity details to comply with legal and professional rules and to enable us to provide you with professional services in accordance with a pre agreed letter of engagement
- a record of our financial dealings with you

This data can be viewed by authorised people in our firm and our software suppliers, to:

- ensure our procedures work correctly and to the highest professional standards
- gather feedback to improve our services
- respond to any feedback you send us, if you've asked us to
- provide you with information about our services if you want it
- to enable us to comply with Money Laundering and Anti Terrorism legislation and to enable us to provide you with professional services in accordance with a pre agreed letter of engagement

Where your data is stored

We have strict controls over how and why your data can be accessed.

We store your data on secure servers in the European Economic Area (EEA). Most of our data is stored on local computers in our offices in York, but some software based data, such as payroll data may be shared with our software providers on a secure and confidential basis.

None of our suppliers are based outside the EEA.

By submitting your personal data to us by any means, you agree to this.

Keeping your data secure

Sending information over the internet is generally not completely secure, and we cannot guarantee the security of your data while it is in transit. For this reason, some data, for example bank account details, will only be gathered by email or telephone.

Any data you send is at your own risk.

We have procedures and security features in place to keep your data secure once we receive it.

Disclosing your information

We may pass on your personal information if we have a legal obligation to do so, or if we have to enforce or apply our terms of use of our website or contained within our letters of engagement and other agreements. This includes exchanging information with government departments for legal reasons.

We will not share your information with any other organisations for marketing, market research or commercial purposes, and we don't pass on your details to other websites, except Government websites such as those of Companies House, HMRC, the Charity Commission and the Pension Regulator, and only then in the course of provision of professional services in accordance with a pre agreed letter of engagement

Data Retention

Data received when the matter does not proceed to the issuing of a letter of engagement.

When initial enquiries are made by a prospective client, there may be the necessity for the exchange of information for both parties to assess whether or not they wish to enter into a contractual relationship.

This may consist of both personal data and identity/know your client data required under the Money Laundering legislation.

If either Peter Brown & Co or the prospective client decide not to proceed with the matter and if Peter Brown & Co have not issued a formal letter of engagement, then all data except identity data will be deleted at the expiry of one month after the sending or receiving of the last communication by either party, unless the prospective client requests earlier deletion.

Any identity/know your client information required under the Money Laundering legislation shall be deleted as above unless longer retention is required under the legislation.

Data received when the matter does proceed to the issuing of a letter of engagement.

When accounts are prepared, or financial advice is given or tax affairs are dealt with on behalf of clients, Government departments are entitled to raise enquiries on many aspects of a client's affairs. These enquiries can arise up to six years after the occurrence of an event, and very occasionally up to 20 years after the event.

It is vital for the client's interests that data is held on file by their advisors so they may be able to respond to any such enquiries.

As a consequence it is our routine practice to keep all client data for existing clients indefinitely until they cease to be clients, and when they cease to be clients until six years have elapsed since they ceased to be clients.

When a client ceases to be a client, their electronic records are clearly marked for deletion after six years and are kept in a separate electronic archive from the records of active clients.

Our letter of engagement contains the following specific provisions:-

The Regulation place express obligations on you as a data controller where we as a data processor undertake the processing of personal data on your behalf. We therefore confirm that we will at all times comply with the requirements of the Regulation when processing data on your behalf. In particular we confirm we have adequate security measures in place and that we will comply with any obligations equivalent to those placed on you as data controller.

The Regulation place express obligations on us as a data controller where we as a data controller undertake the processing of controlling personal data relating to your company, directors, employees and other interested parties. We confirm that we will at all times comply with the requirements of the Regulation when controlling such data. In particular we confirm

we have adequate security measures in place and that we will comply with any obligations equivalent to those placed on you as data controller

To enable us to discharge the services agreed under this engagement, and for other related purposes including updating and enhancing client records, analysis for management purposes and statutory returns, crime prevention and legal and regulatory compliance, we may obtain, use, process and disclose personal data about you. You have a right of access, under data protection legislation, to the personal data that we hold about you. For the purposes of the General Data Protection Regulation, the Data Controller in relation to personal data supplied about you is Peter Brown.

By agreeing to this letter of engagement by appending your signature at the foot, you are giving your consent to our lawful processing and controlling of any data that we will lawfully hold or collect relating to your affairs. This may arise under contract, in accordance with this letter, or as a result of a legal obligation falling wither on your or on us or be information where it is required by us to protect our legitimate interests.

Payroll records of employees

Payroll records of employees will also be kept for six years, both to facilitate any future enquiries from the authorities and any future reference requests by potential future employees.

Your rights

You can find out what information we hold about you by clicking the link at the bottom of this page, and ask us not to use any of the information we collect. Such requests may be made either by email or in writing.

Links to other websites

Our websites contain links to other websites.

This privacy policy only applies to Undershot Ltd practising as Peter Brown & Co, and doesn't cover other services and transactions that we link to. These services have their own terms and conditions and privacy policies.

Following a link to another website

If you go to another website from this one, read the privacy policy on that website to find out what it does with your information.

Following a link to our website from another website

If you come to our website from another website, we may receive information from the other website. We don't use this data. You should read the privacy policy of the website you came from to find out more about this.