

## **Privacy Policy – Data Protection**

### **Joseph Lawrence**

Joseph Lawrence are a firm of accountants and Chartered Tax Advisers practicing in the United Kingdom. We respect your privacy and want to be clear about how we handle information about you.

This website is managed by Joseph Lawrence & Co (Accountants) Limited, registered in England & Wales with registered number 6388414.

### **Third party links and websites**

Joseph Lawrence is not responsible for the privacy policies of third party sites to which links are provided. The privacy policies on such sites should be checked before providing them with any personal information.

### **What information may we collect about you?**

In the course of providing our services to you, or in compliance with regulatory or legal requirements, we may collect a broad range of personal data from you and others. Your information will be collected, stored and used in accordance with this privacy statement and our engagement terms.

We may collect personal data about you, including things such as:

- Your contact details.
- Your date of birth.
- Where you work.
- Financial information.
- Tax information.
- Information about your family.
- Information about your lifestyle, interests and affiliations.
- Your wishes and criteria in respect of any matter we are helping you with.

Usually we will have received this directly from you. However it is possible we may also receive personal data about you from others, such as members of your family, business partners and associates, employers, another party to a transaction you are engaged in or other professional advisers.

### **How will we use the information?**

Our use of such personal data is subject to data protection law.

We mainly use your personal data to provide you with information or services you have requested. We may also use it for any other purpose for which you give your consent. For example we may send you additional information about us or our services, if you have consented to us doing so.

We may also use it for other normal purposes connected with our work. For example we will use your information to update our own business records, complete statutory returns, and otherwise comply with our regulatory obligations.

### **Will we share information about you with anyone?**

We take your privacy seriously. We will never sell your personal data to anyone, and we take precautions to keep it secure.

It will sometimes be a normal and necessary part of our work to pass on information to third parties. For example:

- We may pass on information to others assisting with the work we do for you, such as other professional advisers.
- We will need to allow computer system access to our IT consultants and software providers, as and when required for the performance of their work for us.
- We will need to pass on information to our insurance providers, if you opt to take out insurance through us, for example for tax enquiry cover or HR cover.
- We will need to pass on information to the tax authorities if engaged by you to do so.
- We may need to pass on information to those who, in rare cases, help us collect outstanding accounts.

In addition our business may be audited or checked by third parties such as our regulatory bodies, those providing professional services to us, or those with whom we are entering into business relationships. It is sometimes inevitable that such third parties will see some information about you.

All third parties to whom we need to pass information about you are required to maintain confidentiality in relation to your information.

### **How long will we keep information about you?**

For clients, unless you tell us not to, we intend to destroy correspondence and other papers that are more than seven years old, except documents we think may be of continuing significance. You must tell us if you wish us to keep any document for any longer period.

For other individuals, we will destroy personal information once it becomes clear to us that we no longer have reason to keep it, unless you request that we retain it.

### **Your rights**

You have a right of access under data protection law to the personal data that we hold about you. We seek to keep that personal data correct and up to date. You should let us know if you believe the information we hold about you needs to be corrected or updated.

You also have a right to request that documents containing your personal data are destroyed. Provided the documents do not need to be kept for legal, regulatory or other valid reasons, we will destroy them following your request.

### **Changes to our privacy statement**

We keep this privacy statement under regular review and will place any updates on our website. This privacy statement was last updated on 29 June 2018.