



B A Y R D R O Y
CHARTERED CERTIFIED ACCOUNTANTS

External Privacy Statement

Who we are

This is the privacy statement of Bayrd Roy which is a professional firm of accountants regulated by the Association of Chartered Certified Accountants (ACCA) and having our registered office at 31 Buckstone Court, Edinburgh, EH10 6UL. We provide accounting services from our office in Edinburgh and on client premises.

We are fully committed to handling personal information in accordance with data protection legislation and best data protection practices. This means that your personal information will be:

1. Processed lawfully, fairly, and in a transparent manner.
2. Collected for specified, explicit and legitimate purposes.
3. Only collected so far as required for our lawful purposes.
4. As accurate and up to date as possible.
5. Retained for a reasonable period of time, in accordance with retention policies.
6. Processed in a manner which ensures an appropriate level of security.

This privacy statement explains how we collect and use personal information about you.

What personal information we collect

For individual clients of the firm, we hold the following personal data about you:

- For all clients – your name, contact address, phone number(s) and email address(es).
- For Companies, Sole Traders and Partnerships – NI number, date of birth and tax code
- For payroll clients - your date of birth, NI number, employee reference number, salary details and tax code.
- For tax clients – your date of birth, NI number, marital status, details of income and deductions.

For organisational clients of the firm, we hold the following personal data for key contacts within the organisation:

- For all clients – your name, contact address, phone number(s) and email address(es).
- For trustees/directors – passport or driver license details (where provided for money laundering checking purposes)

Where we collect personal information from

Most of the personal data we hold comes directly from you. There are various ways in which we may collect that, namely:

- Email and written correspondence.
- Telephone discussions.
- Direct contact at our premises and elsewhere.

We may also collect further information as follows:

- From Companies House – names of Directors of companies, dates of appointment and resignation from companies.
- From HMRC – details of tax amounts paid, tax calculations and statements of account

How we use your personal information

We will only process personal information where we believe we have a lawful basis to do so. We use your personal data as follows:

- To enable us to deliver the service you have contracted us to provide to you. For example, to calculate your net pay or to complete your personal tax return.
- To enable us to meet our legal responsibilities. For example, to verify your identity to meet money laundering legislative requirements.
- To enable us to communicate with you by post, email or telephone. For example, to follow up queries.

Who we share your personal information with

We will only share your data with those organisations which are a necessary part of providing the service you have contracted us to do. This includes:

- HMRC – personal data attached to your tax return, tax information from your payroll data, individual donors' data within your organisational gift aid return.
- Companies House – names of Directors within company accounts.
- OSCR – names of trustees of charities.

How long we retain your personal information for

We retain your personal information for no longer than the length of time required by law, for record keeping or for legal claims purposes.

Holding personal information outside the EEA

We do not hold any personal data outside the EEA.

Using our website

Our website makes use of cookie files which allow us to recognise and count the number of visitors to our site and to see how visitors move around our site when they are using it. This helps us to improve the way our site works, for example, by ensuring that users are finding what they are looking for easily.

If you wish to delete any such cookie files, please refer to the instructions for your file management software to locate the file or directory that stores cookies. Our cookies will contain the domain name innesandpartners.com within the file name.

You may refuse to accept cookie files when visiting our site, by activating the setting on your browser which allows you to refuse the setting of cookies.

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 and 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.
- We are using that information with your consent and you have withdrawn your consent – see *Withdrawing consent to using your information* below.

- 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.

Objecting to how we may use your information – You have the right at any time to require us to stop using your personal information for direct marketing purposes. In addition, 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.

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 this is no longer a basis for using your personal information but you don't 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.

Automated processing – If we use your personal information on an automated basis to make decisions which significantly affect you, you have the right to ask that the decision be reviewed by an individual to whom you may make representations and contest the decision. This right only applies where we use your information with your consent or as part of a contractual relationship with you.

Withdrawing consent using your information – Where we use your personal information with your consent you may withdraw that consent at any time and we will stop using your personal information for the purpose(s) for which consent was given.

Please contact us in any of the ways set out in the *Contact information and further advice* section if you wish to exercise any of these rights.

Changes to our privacy statement

We keep this privacy statement under regular review and will place any updates on this website. Paper copies of the privacy statement may also be obtained by emailing kroy@bayrdroy.com

This privacy statement was last updated on 30 April 2018.

Contact information and further advice

If you have any queries in relation to our data protection policies, please email us at kroy@bayrdroy.com and mark your query for the attention of our Data Protection Officer.

Complaints

We seek to resolve directly all complaints about how we handle personal information but you also have the right to lodge a complaint with the Information Commissioner's Office, whose contact details are as follows:

Information Commissioner's Office
Wycliffe House
Water Lane
Wilmslow
Cheshire
SK9 5AF

Telephone - 0303 123 1113 (local rate) or 01625 545 745
Website – www.ico.org.uk