



## Privacy Policy Notice

Solidrock Accountancy Ltd respects your privacy and is committed to protecting your personal data. This privacy policy informs you of how we look after your personal data.

### **About us**

The data controller is Solidrock Accountancy Ltd (referred to as 'the company', 'we', 'us' or 'our' in this policy), located at Clarence House, 35 Clarence Street, Market Harborough, Leicestershire LE16 7NE.

We are committed to compliance with all relevant UK and EU laws in respect of personal data, and to protecting the rights and freedoms of individuals whose information we collect in accordance with the General Data Protection Regulations (GDPR).

We take your privacy as a high priority and will only use your personal information to provide the Services you have requested from us, or detailed at the point of Engagement. We will only use this information subject to your instructions, data protection law and our duty of confidentiality.

The company is registered with the Information Commissioner's Office

### **What information do we hold about you and why?**

The majority of the data we hold is in order to provide our professional services to you (including business data and personal details of individual tax clients, shareholders, directors and employees). We may also hold data of forthcoming clients, contacts and organisations relevant to the operation and development of our company. We use different methods to collect this data; information provided by you when agreeing to become a client; information you subsequently supply to us during the course of our ongoing work; from publicly available information e.g. Companies House; and authorised correspondence with government bodies. We hold the following categories of data:

- Basic identity and contact information (name, address, e-mail address, telephone numbers)
- Information you supply to us, including information for tax returns, data and backups from accounts and payroll systems, spreadsheets and other documents
- Internal administration and transaction information – including payment and invoice data held in our accounts system
- Compliance data – for example – Tax Return, Company Secretarial and P11D data
- Correspondence, e-mail history and other electronic and scanned documents held in our document management system

- Temporary documents, such as exported data from accounts systems; application working files; other files and scanned documents saved in preparation for e-mailing, encryption or loading into document management

We do not collect any special categories of sensitive personal data such as race or religion.

### **How do we collect your personal data?**

Information may be collected in many different ways but predominantly as set out below:

#### **Face to Face**

If you attend our office or we visit you, we may collect your personal data. We may receive personal data from you for the purposes of our money laundering checks, such as a copy of your passport. This data will only be processed for the purposes of preventing money laundering and terrorist financing, or as otherwise permitted by law or with your express consent.

#### **Telephone calls**

If we make phone calls to you, we may gather some initial information via this method.

#### **Emails**

If you email us, we may keep a record of your email address and the email as evidence of the contact. We are unable to guarantee the security of any email initiated by you and we recommend that you keep the amount of confidential information you send to us via email to a minimum. We recommend that where available you use our secure online services.

### **Who do we get your personal information from?**

This information is collected in a number of ways:

- Provided to us directly by you when you sign up to a service we are providing;
- Provided by another professional (Previous accountants)
- We may also receive information from government bodies and regulators such as the Department of Work and Pensions and Her Majesty's Revenue and Customs.

We want the data we hold to be accurate as possible. If you become aware that it is not please contact us as soon as possible so that we can correct it.

### **Who do we share your information with?**

Our services for you may require us to pass your information to our third-party service providers, agents and other associated organisations for the purposes of completing tasks and providing the Services to you on our behalf. However, when we use third party service providers, we disclose only the personal information that is necessary to deliver the Services.

We will only share your information where it is necessary to do so. Our firm will not share your information without your consent unless the law requires or allows us to do so.

We only use your personal data as the law allows. In the terms of our engagement letter we have clients express consent and authority to process the data for the purposes of the services that we have agreed to provide. We also store information and copies of identity documents in order to comply with Anti-Money Laundering legislation. This forms a legal obligation.

### **How do we keep your data safe?**

When you give us personal information, we take steps to make sure that it's treated securely. All personal information is stored in a secure location.

We have an information assurance framework in place which ensures that appropriate technical and organisational measures are in place to help keep your information secure and to reduce the risk of loss and theft.

Access to information is strictly controlled based on the role of the professional.

All staff are required to undertake regular data protection training and must comply with a variety of security policies designed to keep your information secure.

Emails you send to us over the Internet, can never be guaranteed to be 100% secure. As a result, while 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 certain parts of our documents/files, you are responsible for keeping this password confidential. We ask you not to share your password with anyone.

### **How long will we hold your data for?**

We will hold your data for 7 years in line with our regulatory requirements, after which it will be securely destroyed. We provide a full audit trail to show how all documents have been destroyed and hold a certificate of destruction, if a third party is used.

### **Access to your information**

You have a number of rights which relate to your personal data. You are entitled to request access to any personal data we hold about you and you can also request a copy. If you would like a copy of some or all your personal information, please email or write to us.

Where we are relying on your consent to process your personal data you are entitled to withdraw your consent at any time.

We want to make sure your personal information is accurate and up to date. You may ask us to correct or remove information you think is inaccurate by emailing or writing to us.

**Complaints**

If you feel that your personal data has been processed in a way that does not meet the GDPR, you have a specific right to lodge a complaint with the relevant supervisory authority. The supervisory authority will then tell you of the progress and outcome of your complaint. The supervisory authority in the UK is the Information Commissioner's Office. ([www.ico.org.uk](http://www.ico.org.uk)) We would, however, appreciate the chance to deal with your concerns before you approach the ICO so please contact us in the first instance

**Changes to our Privacy Policy**

Effective changes were made to this policy in May 2018. It is a living document that is subject to change and should be checked periodically. We keep our privacy policy under regular review and we will place any updates on this web page. This privacy policy was last reviewed on 9 September 2024.

**How to contact us**

Please contact us if you have any questions about our privacy policy or information, we hold about you:

- By email: [office@solidrockaccountancy.co.uk](mailto:office@solidrockaccountancy.co.uk) .
- Or write to us at Clarence House, 35 Clarence Street, Market Harborough, Leicestershire, LE16 7NE