

PRIVACY STATEMENT

This privacy statement applies to Xtax Accountancy Services Ltd. For the purposes of this statement by 'we', we mean Xtax Accountancy Services Ltd. We are committed to protecting your personal data in accordance with the Data Protection Act 2018 (DPA 2018) and the General Data Protection Regulation (GDPR).

Xtax Accountancy Services Ltd is a data processor and this statement provides information on what data we hold about you and how we will use it.

We are registered with the Information Commissioner's Office. Our registration number is ZA317648.

WHAT PERSONAL DATA DO WE HOLD FOR YOU

- Your name, address and date of birth
- Your National Insurance Number and Unique Tax Reference (UTR)
- Telephone numbers and email address
- A copy of your photo ID
- Marital status
- Business Type
- Details of your income and/or employment.
- Personal and salary details for staff.

You are responsible to making sure the information we hold for you is accurate and up to date.

HOW DO WE USE YOUR PERSONAL DATA

We intend to process personal data for the following purposes:

- to enable us to supply professional services to you as our client
- to fulfil our obligations under relevant laws in force from time to time
- to enable us to invoice you for our services and investigate/address any fee disputes that may have arisen
- to contact you about other services we provide which may be of interest to you if you have consented to us doing so.

WHO DO WE SHARE YOUR DATA WITH

We often need to share your data with trusted third parties by law to deliver the services you have requested from us or where we have another legitimate interest in doing so.

These include:

- HMRC
- Companies House
- Our fee protection insurer provider
- Your pension provider
- Subcontractors
- Other third parties who you permit us to correspond with.

If the law allows or requires us to do so, we may share your personal data with:

- the police and law enforcement agencies
- courts and tribunals
- the Information Commissioner's Office ("ICO").

We may need to share your personal data with the third parties identified above in order to comply with our legal obligations, including our legal obligations to you. If you ask us not to share your personal data with such third parties we may need to cease to act.

HOW IS YOUR DATA STORED

We take the security of your data we hold seriously. Our digital data is stored securely via a cloud based IT system located within the European Economic Area. Files within this storage are encrypted and the infrastructure is regularly tested by the supplier to identify vulnerabilities. Access to the files within the storage is only granted where individuals have a business need to view the information.

HOW LONG WILL WE KEEP YOUR DATA

Our contractual terms provide for the destruction of documents after 7 years and therefore agreement to the contractual terms is taken as agreement to the retention of records for this period, and to their destruction thereafter.

WHAT ARE YOUR RIGHTS OVER YOUR PERSONAL DATA

You have the right to request:

- Access to the personal data we hold about you
- The correction of your personal data when incorrect, out of date or incomplete.

If you have any questions about this privacy statement or how and why we process personal data, please contact: Corinne Sadler, Xtax Accountancy Services Ltd, 8 Abernant Drive, Newmarket, CB8 0FH, 01638 482624.

If you are not satisfied with the way any complaint you make in relation to your personal information is handled by us then you may be able to refer your complaint to the relevant data protection regulator which in the UK is the Information Commissioner's Office.