
PRIVACY NOTICE

BACKGROUND:

RON MORRIS AFA understands that your privacy is important to you and that you care about how your personal data is used. I respect and value the privacy of all of our clients and will only collect and use personal data in ways that are described here, and in a way that is consistent with my obligations and your rights under the law.

1. Information About Me

Ron Morris AFA, sole practitioner.

1 Greenhill, SHERBORNE, Dorset DT9 4EW

Data Protection Officer: Ron Morris.

Email address: ron@ronmorris.co.uk.

Telephone number: 01935 817508

Postal Address: 1 Greenhill, SHERBORNE, Dorset DT9 4EW.

I am regulated by the Information Commissioner's Office (ICO). My Registration Number is: Z5848594

I am a member of the Institute of Financial Accountants (IFA) and Institute of Certified Practising Accountants (ICPA).

2. What Does This Notice Cover?

This Privacy Notice Information explains how I use your personal data: how it is collected, how it is held, and how it is processed. It also explains your rights under the law relating to your personal data.

3. What is Personal Data?

Personal data is defined by the General Data Protection Regulation (EU Regulation 2016/679) (the "GDPR") as 'any information relating to an identifiable person who can be directly or indirectly identified in particular by reference to an identifier'.

Personal data is, in simpler terms, any information about you that enables you to be identified. Personal data covers obvious information such as your name and contact details, but it also covers less obvious information such as identification numbers, electronic location data, and other online identifiers.

The personal data that I use is set out in Part 5, below.

4. What Are My Rights?

Under the GDPR, you have the following rights, which I will always work to uphold:

- a) The right to be informed about my collection and use of your personal data. This Privacy Notice should tell you everything you need to know, but you can always contact me to find out more or to ask any questions using the details in Part 11.

- b) The right to access the personal data I hold about you. Part 10 will tell you how to do this.
- c) The right to have your personal data rectified if any of your personal data held by me is inaccurate or incomplete. Please contact me using the details in Part 11 to find out more.
- d) The right to be forgotten, that is, the right to ask me to delete or otherwise dispose of any of your personal data that I have. Please contact me using the details in Part 11 to find out more.
- e) The right to restrict (that is, prevent) the processing of your personal data.
- f) The right to object to me using your personal data for a particular purpose or purposes.
- g) The right to data portability. This means that, if you have provided personal data to me directly, I am using it with your consent or for the performance of an engagement, and that data is processed using automated means, you can ask me for a copy of that personal data to re-use with another service or business in many cases.
- h) Rights relating to automated decision-making and profiling. I do not use your personal data in this way.
- i) For more information about my use of your personal data or exercising your rights as outlined above, please contact me using the details provided in Part 11.

Further information about your rights can also be obtained from the Information Commissioner's Office or your local Citizens Advice Bureau.

If you have any cause for complaint about my use of your personal data, you have the right to lodge a complaint with the Information Commissioner's Office.

5. **What Personal Data Do You Collect?**

I may collect some or all of the following personal data. This may vary according to your relationship with me:

- Name
- Date of birth
- Gender
- Marital status
- Address
- Email address
- Landline and mobile telephone numbers
- Business name
- Job title
- Occupation or Profession
- HMRC Unique Tax Reference (UTR)
- National Insurance Number.
- Tax Office

- Bank details for the purposes of tax return entries for refunds of tax

6. **How Do You Use My Personal Data?**

Under the GDPR, I must always have a lawful basis for using personal data. This may be because the data is necessary for my performance under the terms of a letter of engagement with you, because you have consented to my use of your personal data, or because it is in my legitimate business interests to use it. Your personal data will be used for the following purposes:

- Providing and managing your tax and accounts affairs.
- Supplying my services to you. Your personal details are required in order for me to enter into a contract with you.
- Personalising my services for you.
- Communicating with you. This may include responding to emails or calls from you.

You will not be sent any unlawful marketing or spam. I will always work to fully protect your rights and comply with my obligations under the GDPR and the Privacy and Electronic Communications (EC Directive) Regulations 2003, and you will always have the opportunity to opt-out.

7. **How Long Will You Keep My Personal Data?**

I will not keep your personal data for any longer than is necessary in light of the reason(s) for which it was first collected. Your personal data will therefore be kept for the following period:

- Your personal data will be retained for at least six years and to meet compliance with the ICO or HMRC.

8. **How and Where Do You Store or Transfer My Personal Data?**

I will only store or transfer your personal data in the UK. This means that it will be fully protected under the GDPR.

The security of your personal data is essential to me, and to protect your data, I take a number of important measures, including the following:

- Encryption and secure internal backups. No external means are used.

9. **Do You Share My Personal Data?**

I will not share any of your personal data with any third parties for any purposes, subject to one important exception.

In some limited circumstances, I may be legally required to share certain personal data, which might include yours, if I am involved in legal proceedings or complying with legal obligations, a court order, or the instructions of a government authority, for example, HMRC.

I may sometimes contract with the following third parties to supply services to you on

my behalf. These may include payment processing, delivery, and marketing. In some cases, those third parties may require access to some or all of your personal data that I hold:

Abbey Tax Fee Protection

If any of your personal data is required by a third party, as described above, I will take steps to ensure that your personal data is handled safely, securely, and in accordance with your rights, my obligations, and the third party's obligations under the law, as described above in Part 8.

In some limited circumstances, I may be legally required to share certain personal data, which might include yours, if I am involved in legal proceedings or complying with legal obligations, a court order, or the instructions of a government authority.

10. **How Can I Access My Personal Data?**

If you want to know what personal data I have about you, you can ask me for details of that personal data and for a copy of it (where any such personal data is held). This is known as a "subject access request".

All subject access requests should be made in writing and sent to the email or postal addresses shown in Part 11. Let me everything I need to know to respond to your request as quickly as possible.

There is not normally any charge for a subject access request. If your request is 'manifestly unfounded or excessive' (for example, if you make repetitive requests) a fee may be charged to cover my administrative costs in responding.

I will respond to your subject access request within less than one month of receiving it. Normally, I aim to provide a complete response, including a copy of your personal data within that time. In some cases, however, particularly if your request is more complex, more time may be required up to a maximum of three months from the date I receive your request. You will be kept fully informed of my progress.

11. **How Do I Contact You?**

To contact me about anything to do with your personal data and data protection, including to make a subject access request, please use the following details:

Email address: ron@ronmorris.co.uk

Telephone number: 01935 817508

Postal Address: 1 Greenhill, SHERBORNE, Dorset DT9 4EW.

12. **Changes to this Privacy Notice**

I may change this Privacy Notice from time to time. This may be necessary, for example, if the law changes, or if I change my business in a way that affects personal data protection.

Any changes will be advised using the contact information I have for you