

Data Protection Privacy Statement

This is the privacy statement of Glen Drummond FA LLP t/a Glen Drummond Financial Accountants which explains how we collect and use personal information about our clients.

What personal information we collect

The type of personal information we are required to collect in order to assess your financial position and offer accountancy and taxation advice are:

- Name, address, date of birth, national insurance number and unique taxpayer reference number;
- Details of all income and expenditure and assets and liabilities.
- Bank details for payment/repayment of taxes and standing order accounts

Where we collect personal information from

The sources of this information will include directly from our clients, creditor and Bank statements and publicly available information such as the land register, local council websites and Companies House etc.

How we use your personal information

The purpose of processing the data will be to assess your financial position and advise of your best solutions for your accounting and taxation affairs.

The purposes for which your personal information is processed may include any or all of the following:

- deliver services and meet legal responsibilities
- verify your identity
- communication with you, HMRC and at your request and financial lenders or landlords you ask us to provide financial information to
- maintain our file records as required by legislation and our recognised professional body (Institute of Financial Accountants)
- prepare and submit accounts and self-assessment tax returns at your request
- prevent and detect crime, fraud or corruption.

Who we share your personal information with

We will share your personal information, where required by legislation, with HMRC and the National Crime Agency (if suspicious activity is detected).

If you do not provide your personal information

If you do not provide your personal information at the outset we will not be able to provide you with advice as to your best solutions for your accountancy and taxation affairs. Once you have chosen to become a client if you do not provide your personal information we would be unable provide you with any of our accountancy or taxation services.

How long we retain your personal information for

We are required by legislation to retain our accounts files for a period of 6 years plus current while you are a client. If you leave us then it is your responsibility to keep these records if you have specifically asked us to remove you from our database.

If you contacted us through our web page we keep these for a maximum of six months if you do not become a client. If you do become a client we keep them for the duration of your time with us and then the above paragraph applies.

Holding personal information outside the EEA

We do not hold any personal information outside the EEA.

Your rights

Access to your information – You can request a copy of your personal information 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 errors in your personal information.

Deletion of your information – You have the right to ask us to delete your personal information 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. 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 to validity is exercised, we may only use the relevant personal information with your consent, for tax appeals and certificates to loan providers.

Automated processing – we do not use any personal information on an automated basis

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, contact information and further advice

We regularly review this statement and will place any updates on this website. For paper copies or to discuss our policy or further advice please email info@glen-drummond.co.uk, write to Glen Drummond Financial Accountants, 12 Carron Place, Kelvin Industrial Estate, East Kilbride G75 0YL or call 01355 233236.