

W J Matthews & Son

Privacy Policy

W J Matthews & Son are committed to protecting our clients' personal data. This privacy statement describes why and how we collect and use personal data and includes information about individual's rights.

What information do we collect about you?

In order to provide you with our services and to comply with appropriate legislation we need to collect, use, store and where appropriate share information about you. We will collect this information from documentation that you provide us and from conversations with you.

Our business' clients may engage us to provide professional services which will involve sharing personal data which they control as part of the professional engagement (e.g. payroll services). We may also obtain personal data indirectly about individuals from a variety of sources such as public registers (e.g. Companies House, Charity Commission), news articles or internet searches.

The personal data we collect in order that we may conduct our business include the following matters:

- Contact details such as an individual's name, occupation, telephone numbers, postal and email addresses;
- Family and beneficiary details in order that we have a better understanding of our client's financial position (details would include names and dates of birth of spouses and children);
- Financial information, such as accounting records, bank statements, investment details, payroll records and pension information.
- We do not intentionally collect information about children under 13 years of age, we may obtain limited information about clients' children where this is necessary for us to provide our professional services to that client.

How do we use and share your information?

We may rely on various legal reasons when collecting and using personal data to provide the services we have been engaged to provide, to comply with the requirements of relevant legislation and to operate our business.

We may process personal data in order that we may discharge our professional obligations. Our professional services would include assistance in providing tax advice, completing personal and corporation tax returns, assistance with the submission of VAT returns, the processing of payrolls and other professional services.

We may process personal data in order that we comply with legal or regulatory requirements. We may rely on legitimate interest where we have evaluated that the processing is your interest or where consent has been freely given to us when the personal data was provided to us.

We may occasionally share personal data with trusted third parties to help us deliver efficient and quality services. These recipients are contractually bound to safeguard the data we entrust to them and could include professional file reviewers, engaged as part of quality control purposes and also with law enforcement or other government and regulatory agencies (e.g. HMRC).

We will only share personal data with others when we have your authority to disclose the information to a third party or where there is a legal or regulatory requirement for us to do so.

We will retain information about you on the termination of our engagement for services with you where there is a legitimate business interest and where legal or regulatory requirements require the retention of records.

Security of information

We are committed to keeping an accurate record of the data you provide to us but not for confirming that the data remains accurate. We are dependent on you to provide us with details of changes to personal data, such as a change of address. If you inform us that the data provided to us is no longer accurate, we shall update our records with the new information you provide.

All our partners and staff are required to keep personal information confidential and security measures have been implemented to protect personal information from loss or destruction.

Data Controller and contact information

We are generally controllers for the personal data we process.

We do provide some services as a data processor, such as payroll services. In these engagements the client is the data controller.

Third party organisations that provide services to us

We use third parties to support us in providing our services and to help us in providing our services and to help manage our internal IT systems. For example, software providers, IT and specialist consultants and secure data management services.

Sage Software

Computer Solutions – IT Contractors

Online Practice (DocSafe) – Data Management Services

SWAT - Professional consultants

Individuals' rights regarding personal data

Individuals have certain rights over their personal data and include the following aspects:

Right of access to personal data

You have the right to obtain confirmation as to whether we process personal data about you, receive a copy of your personal data held by us as a controller and obtain certain other information about how and why we process your personal data. This right may be exercised by emailing us at info@wjmf.co.uk. We are obliged to respond to such a request within one month of receipt, except for complex or numerous requests. In such circumstances we will inform you of the extended response period.

Right of amendment of personal data

You have the right to request that your personal data be amended or rectified where it is inaccurate and to have incomplete personal data completed. Where practically possible, once we are informed that any personal data processed by us is no longer accurate, we will update your records as appropriate based on the updated information.

Right to be forgotten

You have the right to obtain deletion of your personal data in the following instances:

- The personal data are no longer necessary in relation to the purposes for which they were collected and processed;
- Our legal grounds for processing is consent, you withdraw consent and we have no other lawful basis for the processing;
- Our legal grounds for processing is that the processing is necessary for legitimate interests pursued by us, you object to our processing and we do not have overriding legitimate grounds;
- Your personal data have been unlawfully processed; or
- Your personal data must be erased to comply with a legal obligation to which we are subject.

Right to restrict processing

You have the right to restrict our processing of your personal data in the following circumstances:

- Where your personal data are no longer necessary in relation to the purposes for which it was collected and processed;
- Your personal data has been unlawfully processed and you request restriction of processing instead of deletion;
- Whilst we verify the accuracy of your personal data where you have queried the accuracy of the data we hold;

- Restriction for a period enabling us to verify whether the legitimate grounds relied on us override your interests where you have objected to processing based on it being necessary for the pursuit of a legitimate interest identified by us.

Right to object to processing

You have the right to object to our processing of your personal data where the legal grounds for processing is that the processing is for a legitimate interest pursued by us.

Right to data portability

You have a right to receive your personal data from us and to have the data sent to another organisation when our lawful basis for processing the personal data is consent or necessity for the performance of our engagement contract with you and the processing is carried out by automated means.

Right to withdraw consent

Where we process personal data based on consent, individuals have the right to withdraw consent. However, we do not generally process data based on consent as there are other lawful bases for processing the information.

Complaints

If you are unhappy with how your personal data is used, please email us at info@wjmf.co.uk. We will look into and respond to any complaint we receive. You also have the right to lodge a complaint with the Information Commissioner's Office, which is the supervisory authority for data protection in the United Kingdom. The Information Commissioner's Office can be contacted at Wycliffe House, Water Lane, Wilmslow, Cheshire, SK9 5AF.