

## Perk Accounting is committed to protecting and respecting your privacy

This Privacy Notice and any other documents referred to in it sets out how Perk Accounting collects, uses, maintains and discloses Personal Data, including any information provided through our website(s) (the “**Website**”).

Your privacy is of the utmost importance to us. Please read this Privacy Notice carefully to understand our views and practices regarding your personal data and how we will treat it.

Whenever you provide Personal Information, we are legally obliged to use it in accordance with the laws concerning the protection of Personal Information. By “**Personal Information**” we refer to information collected or held by Perk Accounting that identifies and relates to you as an individual.

### **WHO WE ARE**

**PERK ACCOUNTING LIMITED** is a company incorporated and registered in England and Wales with company number 07608085, whose registered office address is Office, 31 Cattle Market Street, Norwich, Norfolk, NR1 3DY (“**Perk Accounting**”).

For the purposes of the General Data Protection Regulations, the Data Protection Act 2018 and/or any other applicable data protection and privacy laws and regulations (“**Data Protection Legislation**”), Perk Accounting will be the ‘data controller’ for all Personal Information, we determine the means and purpose of processing and are registered with the Information Commissioners Office under registration number ZA051592.

### **INFORMATION WE COLLECT AND USE AT PERK ACCOUNTING**

We gather and use Personal Information in the following circumstances.

#### **When you engage with us as a client**

When you become a Perk Accounting client we will collect the information required to set up an account including your name, date of birth, email address, work, (and if required) home telephone number, (if acting behalf of a corporate client) the business address, company details and your role within the business that contracts Perk Accounting and any additional information we need to identify which services you will require from us. This may also include answers to security questions, such as mother’s maiden name, father’s first name and town of birth.

To enable us to perform our accountancy services we will also request information to help us deal with HMRC on your behalf such as your UTR number, NI number, VAT number (if applicable) and any relevant tax code information.

Prior to engaging with you we will need to collect sufficient documentation to fulfil our obligation under the law to identify all clients. This may take the form of a passport, driving licence, or another official document confirming your identity as well as supplementary documents to confirm your address, such as a utility bill or similar proof of address. We will only use these items to complete our due diligence requirements.

We collect transactional information informing us of which Perk Accounting services you have engaged with and we will also need to collect payment and invoice information to collect fees for our services.

We may collect additional information you volunteer to us when calling our support staff regarding any elements of our service. We will only retain the Personal Information pertinent to delivering your services.

We require all of this information to process the contract you have us asked to perform for you.

#### **When you express an interest in our services**

When you enquire about our services, we may record your name and contact details to allow us to follow up on any requests you make for further information. In some circumstances, where you have specifically requested information on the price and scope of our services, we may retain your details to provide you with information in the future which we consider relevant to your initial request. You can always object to this future communication during our initial interaction or any subsequent communication.

Every email we send to you for promotional purposes will also contain instructions on how to unsubscribe from receiving them. You can withdraw your consent to process Personal Information at any time by emailing [gary.summons@perkaccounting.co.uk](mailto:gary.summons@perkaccounting.co.uk).

If we rely on the legitimate interest of our business as the legal grounds to process your Personal Information for marketing and promotional purposes, we will always notify you of this and your right to object to this processing. Please see the “Your Right To Object” section below. All of our marketing communications will always contain clear instructions on how to unsubscribe from future communications.

#### **When you use our website**

We may also collect technical information about you when you visit the Website. This information may include the IP address used to connect your computer to the Internet, your browser type, time zone setting, operating system and platform, browser plug-in types and version, the full URL clickstream to, through and from the Website, page response times, download errors, length of visits to certain

pages, page interaction (such as scrolling, clicks and mouse-overs) and methods used to browse away from the page.

This information is stored and used for aggregated and statistical reporting. The collected information is used to provide an overview of how people are accessing and using the Website as well as to enable us to secure and maintain the Website. We collect this information under our legitimate interest to promote our business and ensure the security of our data and that of our clients.

### **When you phone us**

When you phone us, we may also handle your Personal Information (your name, contact details and the other details you provide to us during the call) in order to service your enquiry or provide the customer services you have asked us to perform.

### **If you apply to join us, become a member of our staff or provide services to Perk Accounting**

If you apply for a role with us, we may receive Personal Information directly from you or via a third party (such as a recruitment specialist) which we will only use for the purposes of helping you progress your application. This information will usually include your name and contact details, CV and job history information, your qualifications, information regarding your suitability for the role (such as work eligibility and DBS status) and potentially third party references regarding your previous experience.

We have to collect Personal Information from and on behalf of our staff to enable us to provide them with adequate employment conditions and payment for their services. This information will always include the application information (listed above) as well as payment and tax information (bank account and NI number), next of kin details, work performance (development reviews, achievements) and HR information (absence records, relevant health/sickness information).

We collect Personal Information from our suppliers and service providers to ensure they meet our criteria for fitness to work with our clients (such as professional standards, security details and where required their qualifications and professional experience) as well as invoice details to allow us to pay you for your services to Perk Accounting.

We will process this information under the lawful basis of requirement to perform the terms of your employment contract or service the agreement between yourself and Perk Accounting. If we are collecting sensitive information from or about you, we will always ensure that an exemption to the prohibition to processing such data always applies and a relevant policy is in place.

### **If you fail to provide us with Personal Information**

You always reserve the right to withhold your Personal Information, but this may affect how we provide our services.

Where we need to collect Personal Information by law, or under the terms of a contract we have with you and you fail to provide that data when requested, we may not be able to perform the contract we have or are trying to enter into with you. In this case, we may have to cancel a service you have with us but we will notify you if this is the case at the time.

### **LAWFUL BASIS OF PROCESSING**

We will only process your information for as long as we have a relevant legal basis to do so. This is usually in order to provide you with the services you have requested from Perk Accounting and unless stated, all of the above processing is conducted under the legal basis of contractual necessity.

We will only use your Personal Information for the purposes for which we collected it, unless we reasonably consider that we need to use it for another reason and that reason is compatible with the original purpose. If we consider the new purpose to be incompatible with the original purpose of collection, we will conduct a privacy impact assessment or contact you to request your consent for further processing. If you wish to get an explanation as to how the processing for the new purpose is compatible with the original purpose, please contact us at [gary.summons@perkaccounting.co.uk](mailto:gary.summons@perkaccounting.co.uk).

### **PROTECTING YOUR INFORMATION**

We take our security obligations very seriously and regularly monitor for breaches and potential weaknesses.

Perk Accounting is committed to ensuring that data is stored, archived or disposed of in a safe and secure manner. We have procedures in place to try and prevent any unauthorised access or disclosures and to safeguard and keep secure the information that we collect.

We use computer safeguards such as firewalls and data encryption, we enforce physical access controls to our buildings and files, and we authorise access to Personal Information only for those employees who require it to fulfil their job responsibilities.

However, you should be aware that providing information over the internet can never be guaranteed as being completely safe and if you choose to send such information to us via the internet, you do so at your own risk.

### **Transfer of data outside of the EU**

We shall not transfer any Personal Information to any country outside of the European Economic Area unless we ensure that such Personal Information is subject to an adequate level of protection and appropriate legal safeguards in accordance with Data Protection Legislation. If you wish to access your Personal Information, we will inform you of the transfers we make (if any) and the legal safeguards we have employed to ensure the ongoing security and protection of your data.

## **SHARING YOUR INFORMATION WITH OTHERS**

If and when we share your data, we always do so under a legal obligation or a written agreement governing how your data must be protected.

Please be assured that we will not share your information for any other reason unless we are required by law or permitted to do so under this Privacy Notice. The main circumstances in which we will be permitted or required to disclose this by law will be by court order, to government bodies and law enforcement agencies. However, sometimes we may share your information with third parties in the following ways:

- we may use carefully selected sub-processors to help us collect, store or manage your information. This will always be managed under the terms of a written data processing agreement;
- with your consent we may provide your Personal Information to third parties who provide professional services complementary to our own. We will always inform you of this sharing and the identity of the new controller prior to releasing any of your Personal Information;
- during the course of providing our services we may use professional contractors who will receive the Personal Information required to perform their role, this will always be governed by written terms of business and an accompanying data processing agreement;
- analytics and search engine providers that assist us in the improvement and optimisation of the Website; and
- if Perk Accounting is acquired by a third party, in which case Personal Information held by it about its customers will be one of the transferred assets. We process your Personal Information for this purpose because we have a legitimate interest to ensure our business can be continued by the buyer. If you object to our use of your Personal Information in this way, the relevant seller or buyer of our business may not be able to provide services to you.

## **RETAINING YOUR PERSONAL INFORMATION**

We will only retain your Personal Information for as long as necessary to fulfil the purposes we collected it for, including for the purposes of satisfying any legal, accounting, or reporting requirements.

To determine the appropriate retention period for Personal Information, we consider the amount, nature, and sensitivity of the Personal Information, the potential risk of harm from unauthorised use or disclosure of your Personal Information, the purposes for which we process your Personal Information and whether we can achieve those purposes through other means, and the applicable legal requirements.

## **YOUR RIGHT TO OBJECT**

You have the right to object to us handling your Personal Information when:

- we are handling your Personal Information based on our legitimate interests. If you ask us to stop handling your Personal Information in this way, we will stop unless we can show you that we have compelling grounds as to why our use of your Personal Information should continue; or
- for marketing purposes. If you ask us to stop handling your Personal Information on this basis, we will stop.

## **YOUR RIGHTS TO CONTROL YOUR PERSONAL INFORMATION**

You can exercise the following rights to your data by contacting us at [gary.summons@perkaccounting.co.uk](mailto:gary.summons@perkaccounting.co.uk).

### **Right of access**

You are entitled to receive confirmation as to whether your Personal Information is being processed by us, as well as various other information relating to our use of your Personal Information. You also have the right to a copy of the Personal Information which we are handling regarding you.

### **Right to rectification**

You have the right to require us to rectify any inaccurate Personal Information we hold about you. You also have the right to have incomplete Personal Information we hold about you completed, by providing a supplementary statement to us.

### **Right to restriction**

You can restrict our processing of your Personal Information where:

- you think we hold inaccurate Personal Information about you;
- our handling of your Personal Information breaks the law, but you do not want us to delete it;
- we no longer need to process your Personal Information, but you want us to keep it for legal reasons; or
- we are handling your Personal Information because we have a legitimate interest (as described in the “Information we collect and use” section above, and are in the process of objecting to this use of your Personal Information.

Where you exercise your right to restrict us from using your Personal Information, we will then only process your Personal Information when you agree, except for storage purposes and to handle legal claims.

### **Right to data portability**

You have the right to receive the Personal Information we hold about you in a structured, standard machine-readable format and to send this to another organisation controlling your Personal Information.

### **Right to erasure**

You have the right to require us to erase your Personal Information which we are handling in the following circumstances:

- we no longer need to use your Personal Information for the reasons we told you we collected it for;
- where we needed your consent to use your Personal Information and you have withdrawn your consent;
- you object to our use of your Personal Information and we have no compelling reason to carry on handling your Personal Information;
- our handling of your Personal Information has broken the law; or

- we must erase your Personal Information to comply with a law we are subject to.

#### **Right to complain**

You have the right to issue a complaint directly with the Information Commissioners Office, the data protection supervisory authority for England and Wales (<https://ico.org.uk/concerns/>).

#### **CHANGING THIS PRIVACY NOTICE**

We may change this Privacy Notice at any time to ensure it always accurately reflects the way we collect, use and safeguard your Personal Information.

Please check this notice from time to time to ensure you are aware of any updates we may have made to our Personal Information handling practices. The date of the changes will be listed in the 'Last updated' section below. We will endeavour to notify all of our current clients of any updates to this notice via email and we will post the relevant announcement on our website homepage.

We recommend that you print a copy of this page for your reference.

#### **CONTACTING US**

Please contact us at [gary.summons@perkaccounting.co.uk](mailto:gary.summons@perkaccounting.co.uk) if you have any questions, comments or requests regarding this Privacy Notice.

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