

Edwards Greene respects your privacy and is committed to protecting your personal data. This privacy policy explains how we look after your personal data when you visit our website (regardless of where you visit it from) and when we provide our services to you. It tells you about your privacy rights and how the law protects you.

1. Important information and who we are

1.1 Purpose of this privacy policy

This privacy policy aims to give you information on how Edwards Greene collects and processes your personal data through your use of this website, including any data you may provide through this website when you use our contact form, sign up to our publications or use our services.

This website is not intended for children and we do not knowingly collect data relating to children. It is important that you read this privacy policy together with any other privacy policy or fair processing notice we may provide on specific occasions when we are collecting or processing personal data about you so that you are fully aware of how and why we are using your data. This privacy policy supplements the other notices and is not intended to override them.

1.2 Controller

The partners of Edwards Greene, Richard Edwards and Sarah Davy, are the controllers and are responsible for your personal data (referred to as 'Edwards Greene', 'we', 'us' or 'our' in this privacy policy).

Sarah Davy is the data privacy manager who is responsible for overseeing questions in relation to this privacy policy. If you have any questions about it, including any requests to exercise your legal rights, please contact her using the details set out below.

1.3 Contact details

Our full details are:-

Full name – Edwards Greene Chartered Accountants
Postal Address – 9 Innovation Place, Douglas Drive, Godalming, Surrey GU7 1JX
Telephone – 01483 399499
Data Privacy Manager – Sarah Davy
Email – sarah.davy@edwardsgreene.com

1.4 You have the right to make a complaint at any time to the Information Commissioner's Office (ICO), the UK supervisory authority for data protection issues (www.ico.org.uk). We would, however, appreciate the chance to deal with your concerns before you approach the ICO so please contact us in the first instance.

1.5. Changes to the privacy policy and your duty to inform us of changes

It is important that the personal data we hold about you is accurate and current. Please keep us informed if your personal data changes during your relationship with us.

1.6. Third-party links

This website may include links to third-party websites, plug-ins and applications. Clicking on those links or enabling those connections may allow third parties to collect or share data about you. We do not control these third-party websites and are not responsible for their privacy statements. When you leave our website, we encourage you to read the privacy policy of every website you visit.

2. The data we collect about you

2.1 Personal data, or personal information, means any information about an individual from which that person can be identified. It does not include data where the identity has been removed (anonymous data). We may collect, use, store and transfer different kinds of personal data about you which we have grouped together follows:-

Identity Data – includes first name, maiden name, last name, username or similar identifier, marital status, title, date of birth and gender.



Contact Data – includes billing address, home address, email address and telephone numbers.

Financial Data – includes bank account and information which you provide regarding your personal income and assets, tax affairs and the income, assets and tax affairs of your partner, spouse or other members of your family but only (in all cases) to the extent necessary to provide our services to you when you instruct us.

Transaction Data – includes details about payments to and from you and details of our services to you.

Technical Data – includes internet protocol (IP) address, your login data, browser type and version, time zone setting and location, browser plug-in types and versions, operating system and platform and other technology on the devices you use to access this website.

Profile Data – includes your interests, preferences, feedback and survey responses.

Usage Data – includes information about how you use our website and services.

Marketing and Communications Data – includes your preferences in receiving marketing from us and your communication preferences.

We also collect, use and share Anonymised Data <https://ico.org.uk/for-organisations/guide-to-data-protection/anonymisation/> such as statistical or demographic data for any purpose. Anonymised Data may be derived from your personal data but is not considered personal data in law as this data does not directly or indirectly reveal your identity. For example, we may aggregate your Usage Data to calculate the percentage of users accessing a specific website feature. However, if we combine or connect Anonymised Data with your personal data so that it can directly or indirectly identify you, we treat the combined data as personal data which will be used in accordance with this privacy policy.

We do not collect any Special Categories of Personal Data <https://ico.org.uk/for-organisations/guide-to-the-general-data-protection-regulation-gdpr/lawful-basis-for-processing/special-category-data/> about you (this includes details about your race or ethnicity, religious or philosophical beliefs, sex life, sexual orientation, political opinions, trade union membership, information about your health and genetic and biometric data). Nor do we collect any information about criminal convictions and offences.

2.2 If you fail to provide personal data

Where we need to collect personal data 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 the provision of any service to you but we will notify you if this is the case at the time.

3. How is your personal data collected?

3.1 We use different methods to collect data from and about you including through:-

Direct interactions – You may give us your Identity, Contact, Financial and Transaction Data by filling in forms or by corresponding with us by post, phone, email or otherwise. This includes personal data you provide when you:-

instruct us to provide services to you;
contact us via our website;
subscribe to our newsletter or publications;
request marketing to be sent to you;
enter a survey; or
give us some feedback.

Automated technologies or interactions – As you use our website, we may automatically collect Technical Data about your equipment, browsing actions and patterns. We collect this personal data by using cookies, server logs and other similar technologies. We may also receive Technical Data about you if you visit other websites employing our cookies. Please see our cookie policy for further details.

Third parties or publicly available sources. We may receive personal data about you from various third parties and public sources as set out below:-

Technical Data from analytics providers such as Google based outside the EU and advertising networks such as Facebook based outside the EU.

Contact, Financial and Transaction Data from providers of technical, payment and delivery services.

Identity, Contact and Financial Data from AML verification services such as SmartSearch based inside the EU.

Identity and Contact Data from publicly available sources such as Companies House and the Electoral Register based inside the EU.

Identity, Contact and Financial Data from HM Revenue & Customs.

4. How we use your personal data

4.1 We will only use your personal data when the law allows us to. Most commonly, we will use your personal data in the following circumstances:-

Where we need to provide our services to you in accordance with our contract with you.

Where it is necessary for our legitimate interests (or those of a third party) and your interests and fundamental rights do not override those interests.

Where we need to comply with a legal or regulatory obligation.

Generally we do not rely on consent as a legal basis for processing your personal data other than in relation to sending third party direct marketing communications to you via email or direct mail. You have the right to withdraw consent to marketing at any time by contacting us.

4.2 Purposes for which we will use your personal data

We have set out below, in a table format, a description of all the ways we plan to use your personal data, and which of the legal bases we rely on to do so. We have also identified what our legitimate interests are where appropriate.

Note that we may process your personal data for more than one lawful ground depending on the specific purpose for which we are using your data.

Please contact us if you need details about the specific legal ground we are relying on to process your personal data where more than one ground has been set out in the table below.

Purpose/Activity	Type of data	Lawful basis for processing including basis of legitimate interest
To record you as a new client	(a) Identity (b) Contact	Performance of our contract with you
Providing our services to you	(a) Identity (b) Contact (c) Financial (d) Transaction (e) Marketing and Communications	Performance of our contract with you
To administer and protect our business and this website (including troubleshooting, data analysis, testing, system maintenance, support, reporting and hosting of data)	(a) Identity (b) Contact (c) Technical	Necessary for our legitimate interests (for running our business, provision of administration and IT services, network security, to prevent fraud and in the context of a business reorganisation or group restructuring exercise) Necessary to comply with a legal obligation
To deliver relevant website content and advertisements to you and measure or understand the effectiveness of the advertising we serve to you	(a) Identity (b) Contact (c) Profile (d) Usage (e) Marketing and Communications (f) Technical	Necessary for our legitimate interests (to study how clients use our services, to develop them, to grow our business and to inform our marketing strategy)
To use data analytics to improve our website, products/services, marketing, customer relationships and experiences	(a) Technical (b) Usage	Necessary for our legitimate interests (to define types of clients for our services, to keep our website updated and relevant, to develop our business and to inform our marketing strategy)
To make suggestions and recommendations to you about services that may be of interest to you	(a) Identity (b) Contact (c) Technical (d) Usage (e) Profile	Necessary for our legitimate interests (to develop our products/services and develop our business)

4.3 References to legitimate interest means the interest of our business in conducting and managing our business to enable us to provide our services effectively. We make sure we consider and balance any potential impact on you (both positive and negative) and your rights before we process your personal data for our legitimate interests. We do not use your personal data for activities where our interests are overridden by the impact on you (unless we have your consent or are otherwise required or permitted to by law). You can obtain further information about how we assess our legitimate interests against any potential impact on you in respect of specific activities by contacting us.

4.4 Marketing

You may at any time elect not to receive any marketing and advertising from us or limiting it either by contacting us or by opting out in accordance with the directions given in the material you receive.

4.5 Information about our services

We may use your Identity, Contact, Technical, Usage and Profile Data to form a view on which of our services we think may be of interest to you in our marketing. You will receive marketing communications from us if you have requested information from us or used our services from us and, in each case, you have not opted out of receiving that marketing.

4.6 Third-party marketing

We will get your express opt-in consent before we share your personal data with any third party for marketing purposes.

4.7 Opting out

You can ask us or third parties to stop sending you marketing messages at any time by following the opt-out links on any marketing communications sent to you or by contacting us at any time. Where you opt out of receiving these marketing communications, this will not apply to personal data provided to us for the provision of our services to you.

4.8 Cookies

You can set your browser to refuse all or some browser cookies, or to alert you when websites set or access cookies. If you disable or refuse cookies, please note that some parts of this website may become inaccessible or not function properly. For more information about the cookies, please see www.edwardsgreene.com/cookies.

4.9 Change of purpose

We will only use your personal data 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 you wish to get an explanation as to how the processing for the new purpose is compatible with the original purpose, please contact us. If we need to use your personal data for an unrelated purpose, we will notify you and we will explain the legal basis which allows us to do so.

Please note that we may process your personal data without your knowledge or consent where this is required by law.

5. Disclosures of your personal data

5.1 We may have to share your personal data with the parties set out below for the purposes set out in paragraph 4 above:-

Professional advisers including lawyers, bankers and insurers based in the United Kingdom who provide consultancy, banking, legal insurance and accounting services to us.

Your contact details will be provided to marketing consultants for the purpose of sending you marketing and other information concerning our services which may be of interest.

Service providers based in the EEA who provide IT and systems administration services to us. This includes software providers for practice management, tax return production, payroll, Companies House filing and other similar services for both clients and for our own business.

Third parties to whom we may choose to sell, transfer, or merge parts of our business or our assets. Alternatively, we may seek to acquire other businesses or merge with them. If a change happens to our business, then the new owners may use your personal data in the same way as set out in this privacy policy.

Your own professional advisers who may be based within or outside the European Economic Area ('EEA') but only in accordance with your instructions.

- 5.2 We require all such third parties to respect the security of your personal data and to treat it in accordance with the law. We may require suitable undertakings from your own professional advisers to whom we provide information on your behalf and in accordance with your instructions.
- 5.3 We do not allow our third-party service providers to use your personal data for their own purposes and only permit them to process your personal data for specified purposes and in accordance with our instructions.
- 5.4 In addition, we may have to share your personal data with HM Revenue & Customs, regulators and other authorities based in the United Kingdom or inside or outside the EEA who require reporting and processing activities in certain circumstances. We will obtain your consent before providing this information, where it is required.

6. International transfers

- 6.1 Whenever we transfer your personal data out of the EEA, we ensure a similar degree of protection is afforded to it by ensuring at least one of the following safeguards is implemented:-

We will only transfer your personal data to countries that have been deemed to provide an adequate level of protection for personal data by the European Commission. For further details, see European Commission: Adequacy of the protection of personal data in non-EU countries.

Where we use certain service providers, we may use specific contracts approved by the European Commission which give personal data the same protection it has in Europe. For further details, see European Commission: Model contracts for the transfer of personal data to third countries.

Where we use providers based in the US, we may transfer data to them if they are part of the Privacy Shield which requires them to provide similar protection to personal data shared between the Europe and the US. For further details, see European Commission: EU-US Privacy Shield.

- 6.2 Please contact us if you want further information on the specific mechanism used by us when transferring your personal data out of the EEA.

7. Data security

- 7.1 We have put in place appropriate security measures to prevent your personal data from being accidentally lost, used or accessed in an unauthorised way, altered or disclosed. In addition, we limit access to your personal data to those employees, agents, contractors and other third parties who have a business need to know. They will only process your personal data on our instructions and they are subject to a duty of confidentiality.
- 7.2 We have put in place procedures to deal with any suspected personal data breach and will notify you and any applicable regulator of a breach where we are legally required to do so.

8. Data you provide to us

- 8.1 Before you disclose to us personal data of another person, you must obtain that person's consent to both the disclosure and the processing of that personal information in accordance with this policy.

9. Data retention

- 9.1 How long will you use my personal data for?

We will only retain your personal data 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.

- 9.2 To determine the appropriate retention period for personal data, we consider the amount, nature, and sensitivity of the personal data, the potential risk of harm from unauthorised use or disclosure of your personal data, the purposes for which we process your personal data and whether we can achieve those purposes through other means, and the applicable legal requirements.
- 9.3 By law we have to keep basic information about our clients (including Contact, Identity, Financial and Transaction Data) for six years after they cease being clients for tax purposes.
- 9.4 In some circumstances you can ask us to delete your data: see Request erasure below for further information.
- 9.5 In some circumstances we may anonymise your personal data (so that it can no longer be associated with you) for research or statistical purposes in which case we may use this information indefinitely without further notice to you.

10. Your legal rights

- 10.1 Under certain circumstances, you have rights under data protection laws in relation to your personal data. You have the right to:-

Request access to your personal data (commonly known as a 'data subject access request'). This enables you to receive a copy of the personal data we hold about you and to check that we are lawfully processing it.

Request correction of the personal data that we hold about you. This enables you to have any incomplete or inaccurate data we hold about you corrected, though we may need to verify the accuracy of the new data you provide to us.

Request erasure of your personal data. This enables you to ask us to delete or remove personal data where there is no good reason for us continuing to process it. You also have the right to ask us to delete or remove your personal data where you have successfully exercised your right to object to processing (see below), where we may have processed your information unlawfully or where we are required to erase your personal data to comply with local law. Note, however, that we may not always be able to comply with your request of erasure for specific legal reasons which will be notified to you, if applicable, at the time of your request.

Object to processing of your personal data where we are relying on a legitimate interest (or those of a third party) and there is something about your particular situation which makes you want to object to processing on this ground as you feel it impacts on your fundamental rights and freedoms. You also have the right to object where we are processing your personal data for direct marketing purposes. In some cases, we may demonstrate that we have compelling legitimate grounds to process your information which override your rights and freedoms.

Request restriction of processing of your personal data. This enables you to ask us to suspend the processing of your personal data in the following scenarios: (a) if you want us to establish the data's accuracy; (b) where our use of the data is unlawful but you do not want us to erase it; (c) where you need us to hold the data even if we no longer require it as you need it to establish, exercise or defend legal claims; or (d) you have objected to our use of your data but we need to verify whether we have overriding legitimate grounds to use it.

Request the transfer of your personal data to you or to a third party. We will provide to you, or a third party you have chosen, your personal data in a structured, commonly used, machine-readable format. Note that this right only applies to automated information which you initially provided consent for us to use or where we used the information to perform a contract with you.

If you wish to exercise any of the rights set out above, please contact us.

10.2 No fee usually required

You will not have to pay a fee to access your personal data (or to exercise any of the other rights). However, we may charge a reasonable fee if your request is clearly unfounded, repetitive or excessive. Alternatively, we may refuse to comply with your request in these circumstances.

10.3 What we may need from you

We may need to request specific information from you to help us confirm your identity and ensure your right to access your personal data (or to exercise any of your other rights). This is a security measure to ensure that personal data is not disclosed to any person who has no right to receive it. We may also contact you to ask you for further information in relation to your request to speed up our response.

10.4 Time limit to respond

We try to respond to all legitimate requests within one month. Occasionally it may take us longer than a month if your request is particularly complex or you have made a number of requests. In this case, we will notify you and keep you updated.