

PR Personal Tax

Client Privacy Notice

“PR Personal Tax” is committed to ensuring that your personal data is processed fairly and lawfully, is accurate, is kept securely and is retained for no longer than is necessary.

This “Privacy Notice” sets out what data we collect, how we process it and who we may share it with and why.

It also explains your rights with respect to the Personal Data that we may collect from you; that is data that identifies you as an individual or from which you may be identified.

Why do we need this Privacy Notice & Data Protection Policy?

On the 25th May 2018 the General Data Protection Regulation (GDPR) will come into force and the current Data Protection Act (DPA) 1998 will be updated by a new Act giving effect to its provisions. Before that time the DPA will continue to apply.

This new regulation is intended to better protect individuals by ensuring that Companies, Public Authorities, Charities etc. look after your data properly and within clear guidelines. You may see the term “Data Subject”, this refers to someone whose information or data is held by an organisation.

Who are we?

PR Personal Tax

Peter Roberts, T/A PR Personal Tax, 25a The Hornet, Chichester, West Sussex, PO19 7JL, for simplicity the Company will be referred to as “PRPT” in the remainder of this document.

Who in the Company is responsible for ensuring that we meet our obligations for data protection?

The responsible person is called the **“Data Controller”** (DC) and is registered with the **“Information Commissioner’s Office”** (ICO) – the ICO is the Regulator in the UK for Data Protection. PRPT’s Registration No. is ZA052016, you can check our details on the ICO’s website.

The Data Controller is Peter Roberts and he can be contacted as follows:

By Email: prpersonaltax@btinternet.com

Or in writing to:

The Data Controller, PR Personal Tax, 25A the Hornet, Chichester, West Sussex, PO19 7JL

Why do we need to hold and process your personal data?

PRPT processes personal data in order to fulfil its contractual obligations to provide the following document completion and submission services:

- Self-assessment personal income tax returns.
- Property rental accounts.
- Capital gains computations.
- Small Sole Trader and self-employed pages.
- R40 tax repayment claim forms.

PRPT may also process personal data if at least one of the following applies:

- In order to protect the vital interests of an individual.
- There is explicit consent.
- For financial transactions relating to PRPT's Services.
- For the establishment, exercise or defence of legal claims or whenever Courts or Public Authorities such as HMRC or the Police are acting in their judicial or investigative capacity.
- For reasons of public interest in the area of public health.
- For reasons of substantial public interest, based on law, which is proportionate in the circumstances and which provides measures to safeguard the fundamental rights and the interests of the data subject.
- To ensure compliance with the legal restrictions placed on the use of the Internet.

PRPT may also process personal data with your consent to provide these additional contracted documentary services:

- Pension enquiry form P161.
- Leaving the UK form P85.
- Claiming to reduce tax payments SA303.
- Registration under the Non-Resident Landlord Scheme form NRL1.
- Check PAYE notices of tax coding, advise on their accuracy and suggest where these require adjustment.

What sort of personal information will I be collecting about you and processing?

The categories of information that I collect, hold and process include:

- Personal information (such as name, DoB, address, phone number, email address).
- Details of other addresses or properties owned.
- National Insurance, Tax Reference Number(s) & Bank account Information.
- Financial information as required to make declarations on your behalf to HMRC.
- Information & documents required to satisfy anti-money laundering legislation.

Do we pass or share your personal information with anyone else?

I will not give your information or personal details to anyone outside PRPT, other than those listed below, without your express consent, unless we are required by the law to do so.

We routinely share information with the following, who are controlled by a specific Data Processing Agreement (DPA) which limits the extent to which they may use and process your data to the purposes that we require:

- HMRC.
- Sage Accounting – Online report generation software only.
- Tax Filer – Online report generation software only.
- Companies House – Only when required by legislation.
- MARCOM *Computing* – IT Contractor – Secure Back-up / Recovery Services – Advice on Data Security.

How long will we retain your data?

Some data such as records of financial transactions will be kept for seven years for audit and tax purposes,

PRPT's principle is not to retain any data or personal information for longer than is necessary in relation to the purposes for which it was collected. We will always be driven by best practice to ensure that Information will be held in accordance with the latest guidelines.

What are my rights regarding the data you hold about me?

Under GDPR (the new regulation) you have significantly enhanced rights which include:

1. Being informed of data processing (which is covered by this Privacy Notice).
2. Accessing information (also known as a Subject Access Request (SAR)) that we hold on you. In some circumstances there can be a charge for this.

3. Having inaccuracies corrected promptly.
4. Having information that we hold about you erased except where there is a statutory or legal requirement for us to collect process or hold it.
5. Restricting processing of your data except where there is a contractual, statutory or legal requirement to process it.
6. Data portability where relevant.
7. Intervention in respect of automated decision making (automated decision making is not operated by PRPT).
8. Withdrawing consent (see below).
9. Complaining to the Information Commissioner's Office (ICO) (See below).

Can I stop you holding and processing my data?

Withdrawal of Consent

The lawful basis upon which PRPT processes personal data is that it is necessary in order to comply with our legal and contractual obligations.

Where PRPT processes personal data solely on the basis that you have consented to the processing, you will have the right to withdraw that consent.

To exercise any of these rights you must in the first instance contact the Data Controller (DC) in writing or by email at the addresses on Page 1.

If you are unhappy with the way your request has been handled, you may wish to ask for a review of the DCs decision by challenging it in writing within 28 days.

Complaints to the ICO

If you are not content with the outcome of the internal review, you may apply directly to the Information Commissioner for a decision. Generally the ICO cannot make a decision unless you have exhausted our internal review procedure. The Information Commissioner can be contacted at:

The Information Commissioner's Office,
Wycliffe House, Water Lane, Wilmslow, Cheshire, SK9 5AF