

## Privacy Notice

### Introduction

Welcome to EQ Accountants Limited's ("we" "us" "our") Website Privacy Notice. We are committed to protecting your personal data. This privacy notice outlines what to expect when we collect personal data depending on how you use our site at [www.eqaccountants.co.uk](http://www.eqaccountants.co.uk) (regardless of where you visit it from), including where you sign up to our newsletter and where you contact us via the website, email, telephone, social media or otherwise and also where we contact you. For the avoidance of doubt, it does not cover our processing of client personal data or our staff personal data. Nor is the site intended for children and we do not knowingly collect personal data about children.

It is important that you read this privacy notice together with any other privacy 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 notice supplements other notices and privacy notices and is not intended to override them.

'Personal data' means any information relating to you as an individual, either directly or indirectly. We are the Data Controller over the personal data we collect about you. It is important that we keep your personal data up to date therefore please do let us know if your personal data changes during your relationship with us. If you have any questions or requests regarding your personal data, please contact [data.protection@eqaccountants.co.uk](mailto:data.protection@eqaccountants.co.uk).

You have the right to make a complaint at any time to the Information Commissioner's Office (ICO), the UK regulator for data protection issues ([www.ico.org.uk](http://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.

### What Personal Data do we collect

The personal data we collect within the scope of this privacy notice may include:

- Identity information, such as your name, title, organisation name and position.
- Contact data, such as your address, email and telephone details.
- Technical data, such as your internet protocol (IP) address, 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.
- Usage data includes information about how you use our website, products and services, and any communications we may receive from you.
- Marketing Data – includes your preference of receiving marketing information from us and your preferences of how you would like to receive our information.

We do not usually collect 'special categories' of personal data through our site. ('Special categories' of data include details about your race or ethnicity, religious or philosophical beliefs, sex life, sexual orientation, political opinions, trade union membership, health information, or criminal convictions and offences.) If we do collect any special categories of data, we will make clear the reason to you, and we will ensure we have a lawful basis to process this type of information.

### Where do we get your personal data from?

We obtain your personal data directly from you when you submit our contact form, sign up to our newsletter, use our site, or contact us via telephone, post, social media, email or otherwise.

### Data Security

We take information security very seriously and ensure we employ appropriate physical (e.g. key card office entry, locking doors), technical (e.g. password protection, network firewalls, laptop encryption, multi - authentication mechanisms), and administrative (e.g. confidentiality agreements, training, procedures that limit access to and use of data) measures to protect the information we hold. We also regularly review our security arrangements to ensure they remain effective and appropriate.

## How long information is retained

We will only retain your personal data for as long as reasonably necessary to fulfil the purposes we collected it for, including for the purposes of satisfying any legal, regulatory, tax, accounting or reporting requirements. We may retain your personal data for a longer period in the event of a complaint or if we reasonably believe there is a prospect of litigation in respect to our relationship with you.

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, regulatory, tax, accounting or other requirements.

## How we use your Personal Data

### The circumstances in which we may process your personal data include:

#### Contact Us' form or when you contact us generally

When someone completes our 'contact us' form or contacts us generally we ask for a name, telephone and email address. We process this for our legitimate interests to allow us to reply to enquiries in a helpful and timely manner. If any contact is converted to a client account, the client will be made aware of how your data is held within our Terms of Business.

#### Sign up & Subscription Form & Marketing generally

When a visitor completes our sign-up form for our 'bulletin' or subscription form we ask for a name, email address, postal address and preference of how to receive our bulletin. This allows us to send bulletins in the manner requested by the visitor and/or deliver the subscription. We rely on consent to send this information or deliver the subscription. Visitors can withdraw consent for these by contacting us using the details above or by clicking on 'unsubscribe' in our emails. We may also send marketing communications to third party organisations that we engage with or think may be interested in our services and this will be based on our legitimate interests. Again, recipients can log out by clicking on un-subscribe in the email communications.

#### Cookies

Cookies are small text files that are placed on a visitor's computer by websites that you visit. They are widely used in order to make websites work, or work more efficiently, as well as to provide information to the owners of the site. Collecting this information is for our legitimate interest to learn more about use of our website, our business so that we can learn from this and improve. In some cases, we will also ask for your consent. For information on how we use cookies, please see our Cookie Notice.

#### Lead Forensics

We use a system called Lead Forensics on our website; this system gives us some information on the businesses that visit our website so we can understand who may be interested in our services. This is based on our legitimate interests. This can include email addresses of people involved with these businesses. You can find out more information about how Lead Forensics gathers and uses these email address at the following links:

<https://www.leadforensics.com/privacy-and-cookies/>

<https://blog.leadforensics.com/how-lead-forcnsics-complies-with-gdpr>

#### To manage our relationship with you

We may use your personal data to manage our relationship with you for example, updating you that our privacy notice has changed or asking for feedback. Our lawful basis will be that it is in our legitimate interest to keep you updated of changes to our privacy notice or learn more about our services.

## To administer and protect our business

We may require to use your personal data to administer our business including the maintaining and improvement of this site or in the case of a sale of our assets or shares or corporate restructure. This is in our legitimate interests to do so and we may also have a legal obligation to do so.

## Who we may share your Personal Data with

We may share your personal data with the parties set out below for the purposes set out above:

- Companies within our corporate group of companies where this is necessary for the purposes set out above and/or for legal, tax or regulatory purposes.
- Our Suppliers – we engage third party suppliers that we may share personal data with to receive the relevant service. These include professional advisors, marketing platforms, CRM platforms and web hosting platforms.
- 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 notice.

We require all third parties to respect the security of your personal data and to treat it in accordance with the law. 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.

## Transferring your Personal Data outside of UK

We generally keep the personal data we collect in the UK. However, some of our suppliers or companies within our group are outside of the UK and where we find it necessary to share data with those third parties as outlined above, this means your personal data may be shared outside of the UK. In such circumstances we will ensure such transfer complies with UK data protection legislation and an appropriate transfer mechanism is established, where the recipient country has not been deemed as having adequate protections already in place by the UK Government. For more information on this issue, please contact us on [data.protection@eqaccountants.co.uk](mailto:data.protection@eqaccountants.co.uk).

## Your rights

- **Access to your information** – You have the right to request a copy of the personal data about you that we hold.
- **Correcting your information** – We want to make sure that your personal data is accurate, complete, and up to date, and you may ask us to correct any personal information about you that you believe does not meet these standards.
- **Deletion of your information** – You have the right to ask us to delete personal data about you 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 data for direct marketing purposes. In addition, where we use your personal data to perform tasks carried out in the public interest then, if you ask us to, we will stop using that personal data 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 data. This right might apply, for example, where we are checking the accuracy of personal data 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 data, but

you don't want us to delete the data. Where this right is validly exercised, we may only use the relevant personal data with your consent, for legal claims or where there are other public interest grounds to do so.

- **Automated processing** – If we use your personal data on an automated basis to make decisions which significantly affect you, you have the right to ask that the decision be reviewed by an individual to whom you may make representations and contest the decision. This right only applies where we use your personal data with your consent or as part of a contractual relationship with you.
- **Withdrawing consent using your information** – Where we use your personal data with your consent you may withdraw that consent at any time, and we will stop using your personal data for the purpose(s) for which consent was given.

Please contact us at [data.protection@eqaccountants.co.uk](mailto:data.protection@eqaccountants.co.uk) if you wish to exercise any of these rights. Please note that these rights are not exhaustive and there may be circumstances where we choose not to comply fully with your request where permitted to do so by law.

### Third Party Websites

This site 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 site, we encourage you to read the privacy notice of every website you visit.

### Changes to our privacy notice

We keep this privacy notice under regular review and will place any updates on this website. This version is dated January 2024. Paper copies of the privacy statement may also be obtained by contacting [data.protection@eqaccountants.co.uk](mailto:data.protection@eqaccountants.co.uk) or your usual contact at EQ.