



Privacy Notice

At Jelliff Lamprey we take privacy very seriously and are committed to meeting the new data protection standards (General Data Protection Regulation).

The following privacy notice explains how we use any personal information we collect about you.

About Us

Jelliff Lamprey Partnership Limited (“Jelliff Lamprey “we”, “us”, “our” and “ours”) is an accountancy and tax advisory firm. We are registered in England and Wales as a limited company under number: 10664218 and our registered office is at 8th Floor Connect Centre, Kingston Crescent, Portsmouth, PO2 8QL.

For the purpose of the Data Protection Legislation and this notice, we are the ‘data controller’. This means that we are responsible for deciding how we hold and use personal data about you. We are required under the Data Protection Legislation to notify you of the information contained in this privacy notice.

We have appointed a Data Protection Officer. Our Data Protection Officer is our Data Protection Point of Contact and is responsible for assisting with enquiries in relation to this privacy notice or our treatment of your personal data. Should you wish to contact our Data Protection Point of Contact you can do so using the contact details noted at the end of this notice.

How we may collect your personal data?

We obtain personal data about you, for example, when:

- you request a proposal from us in respect of the services we provide;
- you or your employer or our clients engages us to provide our services and also during the provision of those services;
- you contact us by email, telephone, or post (for example when you have a query about our services); or
- from third parties and/or publicly available resources (for example, from your employer or from Companies House).

What information do we collect, retain and share?

We collect information about you when you engage our professional services. We also collect information when we carry out professional services on your behalf.

The categories of personal information that we collect, hold and share are:

- personal information (i.e. name, address, date of birth, contact numbers);
- details of contact we have had with you in relation to the provision, or the proposed provision, of our services;
- details of any services you have received from us;
- our correspondence and communications with you;



- information about any complaints and enquiries you make to us;
- information we receive from other sources, such as publicly available information, information provided by your employer or our clients.

Why we collect and use this information?

At Jelliff Lamprey we take your privacy seriously and will only use your personal information to provide the Services you have requested from us, detailed in your Letter of Engagement and supporting Schedules and as we have identified above. We will only use this information subject to your instructions, data protection law and our duty of confidentiality.

We collect this information to:

- update and enhance client records;
- prepare and complete statutory returns (i.e. Self-Assessment Tax Returns);
- monitor and advise on tax planning;
- crime prevention and legal and regulatory compliance'
- carrying out credit checks in relation to you.

What is the lawful basis on which we use this information?

We collect and use your personal information under the following lawful basis:

- **Performance of a contract** – the processing is necessary for the contract we hold with you, or because you as an individual have asked for specific steps to be carried out before entering into a contract, and/or;
- **Legal obligation** – the processing is necessary to comply with the law (not including contractual obligations).

Data retention

We will only retain your personal data for as long as is necessary to fulfil the purposes for which it is collected.

When assessing what retention period is appropriate for your personal data, we take into consideration:

- the requirements of our business and the services provided;
- any statutory or legal obligations;
- the purposes for which we originally collected the personal data;
- the lawful grounds on which we based our processing;
- the types of personal data we have collected;
- the amount and categories of your personal data; and
- whether the purpose of the processing could reasonably be fulfilled by other means.

We are required to hold your data for a reasonable period of time. The length of time we hold your data will depend upon the type of data we are holding.



Your data will be held securely and will only be accessible by staff who are required to do so. All data that has passed the retention period will be destroyed/deleted.

We confirm when processing data on your behalf that we will comply with the relevant provisions of applicable data protection legislation. You will also ensure that any disclosure of personal data to us complies with such legislation.

Applicable data protection legislation places express obligations on you as a data controller where we as a data processor undertake the processing of personal data on your behalf. An example would be where we operate a payroll service for you. We therefore confirm that we will at all times use our reasonable endeavours to comply with the requirements of applicable data protection legislation when processing data on your behalf. In particular, we confirm that we have adequate security measures in place and that we will aim to comply with any obligations equivalent to those placed on you as a data controller.

Who we share your information with?

We will share your personal data with third parties where we are required by law, where it is necessary to administer the relationship between us or where we have another legitimate interest in doing so.

Third parties include third-party service providers. The following activities are carried out by third-party service providers: IT and cloud services, professional advisory services, administration services and banking services.

All of our third-party service providers are required to take commercially reasonable and appropriate security measures to protect your personal data. We only permit our third-party service providers to process your personal data for specified purposes and in accordance with our instructions.

Other third parties

We may share your personal data with other third parties, for example in the context of the possible sale or restructuring of the business. We may also need to share your personal data with a regulator or to otherwise comply with the law.

Data Security

We have put in place commercially reasonable and 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.



How can you request access to your personal data?

Under data protection legislation you have a right to request access and a copy of information that we hold on you.

You also have a right to:

- Request access to your personal data. This enables you to receive details of the personal data we hold about you and to check that we are processing it lawfully.
- Object to processing of personal data that is likely to cause or is causing damage or distress
- Prevent processing for the purpose of direct marketing
- In certain circumstances, have inaccurate personal data rectified, blocked erased or destroyed; and
- Lodge a complaint with claim compensation for damages caused by a breach of the Data Protection Act.

To make a request as detailed above please contact:

Data Protection Officer: Beverley Ingle
Email: info@jellifflamprey.com
Telephone Number: 02392 823777
Address: Jelliff Lamprey, 8th Floor Connect Centre, Kingston Crescent,
Portsmouth, Hampshire PO2 8QL

If you are unhappy with the way that your personal information has been used by us or you wish to seek further information please contact us as above. Alternatively you can contact the Information Commissioners Office (<https://ico.org.uk/>).