

## **PHIL DODGSON & PARTNERS LIMITED**

### **PRIVACY POLICY**

#### **SUMMARY**

At Phil Dodgson's, we are committed to maintaining the confidence and trust of our clients. On this page you will find information on how we use data that we collect from clients.

This privacy policy, which applies to all our clients, provides you with information about:

- How we use your data;
- What personal data we collect;
- How we ensure your privacy is kept secure
- Your legal rights relating to your personal data
- How to contact us if you have any questions or concerns

#### **HOW WE USE YOUR DATA**

##### General

Phil Dodgson & Partners Ltd uses your personal data:

- To provide services to you;
- To manage any registered account(s) that you hold with us;
- To verify your identity;
- For crime and fraud prevention, detection and related purposes;
- With your agreement, to contact you by e-mail, phone and mail
- To enable Phil Dodgson & Partners Ltd to manage customer service interactions with you

##### Marketing communications

Phil Dodgson's uses your personal data for mail marketing purposes (with your consent) to update you on the latest insurance policies that Croner Taxwise provides

You have the right to opt out of receiving promotional communications at any time, by:

- Contacting Phil Dodgson & Partners Ltd using the details below

##### Sharing data with third parties

Aside from our service providers, Phil Dodgson's will not disclose your personal data to any third party, except as set out below. We will never sell or rent our customer data to other organisations for marketing purposes.

We may share your data with:

- Credit reference agencies where necessary for card payments;
- Governmental bodies, regulators, law enforcement agencies, courts/tribunals and insurers where we are required to do so: -
- To comply with our legal obligations;
- To exercise our legal rights (for example in court cases);
- For the prevention, detection, investigation of crime or prosecution of offenders; and
- For the protection of our employees and customers.

##### How long do we keep your data?

We will not keep your data for any longer than is necessary for the purposes outlined in this Policy. Different retention periods apply for different types of data, however the longest we will normally hold any personal data is around 7 years.

We request that you collect your accounting records once your accounts have been prepared, as we only have a limited amount of secure storage within our building.

## WHAT PERSONAL DATA DO WE COLLECT?

Phil Dodgson's may collect the following information about you:

- Your title, name, role, age/date of birth and gender
- Your National Insurance number, Unique tax reference
- Your bank details, bank accounts log-ins and passwords
- Your accounting/tax records, including bank statements, payslips, P60s etc
- Contact details: your postal address including billing and delivery addresses, telephone numbers (including mobile) and e-mail address
- Details of services we have provided to you
- Details on how you would like us to keep in touch with you
- Your correspondence and communications with Phil Dodgson's; and
- Other publicly available personal data, including any which you have shared via a public platform (such as a Twitter feed or public Facebook page).

## HOW WE KEEP YOUR DATA SAFE

Phil Dodgson's is committed to keeping your data safe and secure.

All personal information you provide us with is stored on our secure servers. Our security measures include: -

- Encryption of data
- Hardware firewalls and antivirus software
- Cyber security assessments of our network
- Crisis management exercises to ensure we are ready to respond to cyber security attacks and data security incidents;
- Regular penetration testing of systems;
- Security controls such as hardware firewalls and antivirus software, which protect our network and IT infrastructure from unauthorised access; and
- Internal policies outlining our data security procedures, and training for employees.

All paperwork is kept in locked offices and at our secure lock-up.

All backups of data are Encrypted off site and are carried out every evening of the entire week.

## YOUR RIGHTS

You are entitled to view, amend, or delete the personal information that we hold at any time. E-mail your request to our data protection officer Phil Dodgson at [info@pd-accountsskipton.co.uk](mailto:info@pd-accountsskipton.co.uk)

## CONTACT INFORMATION

Please contact us if you have any questions or require further information.

Telephone: 01756 700011

E-Mail: [info@pd-accountsskipton.co.uk](mailto:info@pd-accountsskipton.co.uk)

Address: Phil Dodgson  
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