

# Jackson Robson Licence Ltd

## Data Protection Policy & Procedures (Privacy notice) under GDPR 2018.

### Introduction

Jackson Robson Licence Ltd (JRL) retains & uses certain data for purposes of its contractual obligations; primarily for client work, but also for its employees & others.

Under the General Data Protection Regulations 2018 (GDPR) individuals have increased rights regarding their personal data and users have to ensure that it can justify the keeping of such data & to be accountable for it. GDPR only applies to individuals' data.

### Policy

JRL is a Data Controller and/or Data Processor depending upon the specific professional engagement with clients or its relationship with an employee or other party. Data is collected & used only when necessary.

Data will be controlled and/or processed for various categories of individuals, including clients, persons employed by clients, employees & others (eg: people with no ongoing relationship with us such as visitors and service providers).

In each case JRL determines that the reason for using such data is allowed by GDPR and also ensures that its use of the data is within the regulations insofar as an individual's rights under GDPR are concerned.

JRL is monitored by the Institute of Chartered Accountants in England & Wales (ICAEW) and this policy has been prepared in conjunction with their guidance, our specific written terms of engagement and our standard terms of business (available on our website or in printed form by request).

### Procedures

#### 1. Data we hold

The type of personal data held by us will depend on your relationship with us, but will normally include such details as:

Name	Email address
Address	Date of birth
Telephone number(s)	Details of communications

Personal data is retained on both an electronic database & in hard copy format.

The legal justification for holding this data is that it relates to a contract which the individual has entered into. No approaches are made to a client other than for purposes related to that contract.

When a person's relationship with us ceases, their data is retained for a period of six years after which their data is destroyed.

## **2. Rights of individuals**

Under GDPR individuals have legal rights over their personal data:

1. The right to be informed
2. The right of access
3. The right to rectification
4. The right to erasure
5. The right to restrict processing
6. The right to data portability
7. The right to object
8. Rights in relation to automated decision making & profiling

JRL advises individuals of this Privacy Policy via its website (or in writing by request) together with providing written details to new clients, or to staff via the induction process & relevant in-house material.

## **3. Security**

Only the current directors & authorised staff have access to individuals' personal data. They are trained in data protection.

All data held on paper is retained securely within the firm's offices. Electronically held data is retained on password protected computers by authorised personnel or on cloud software with like access.