

Data Protection Policy for Brian P Buckley & Co T/A BPB Accountants

Introduction

Brian P Buckley & Co T/A BPB Accountants is a Chartered Accountancy practice and Privacy and Data Protection Rights are very important to us.

In the course of our work with you, you give us information about yourself – we respect your trust in us to use, store and share your information in accordance with new laws – including GDPR related legislation. In this Privacy Policy, we explain how we collect personal information about you, how we use it and how you can engage with us about it.

Please be assured that the personal information you provide to us will only be used to ensure that you receive the best service possible, that your data will be held legally, securely and in a compliant manner and that your information can only be assessed by those who require it for the delivery of our services.

Enquiries about this Data Protection Policy should be made to: **Brian P Buckley & Co T/A BPB Accountants, Carlow Gateway Business Centre, Athy Road, Carlow - Email to info@bpb.ie ; Phone to 059 9179666.**

Who we are

When this notice mentions “we” or “us”, Brian P Buckley & Co T/A BPB Accountants operated by Brian Buckley and includes staff employed by him.

Brian Buckley has overall responsibility for Data Protection within the practice and may be contacted by email or phone on the details given above; by calling to the office by appointment, or by writing to him at our office address.

Information & You

So that we can deliver effective service to you, we must gather and use personal information about you. If you do not provide the personal information, we may be unable to provide a service to you.

Why we collect your data

We collect and use personal data information to provide the following services:

- The provision of Customer Service, Enquiry Responses, Quotations and other follow up Information on your request
- Tailoring of professional services to clients
- To manage vendor accounts and for accounting (payment) purposes
- To comply with Regulations and Statutory Obligations
- To comply with requirements of our regulatory body being Chartered Accountants Ireland and general legislation.
- To provide personnel, payroll and pension administration services in connection with our employees
- To get and retain Clear and Opt-In Consent for further marketing follow up
- For provision of the enforcement of legal rights for the protection of both our interests
- For provision of Billing, Payment, Remittance or receipt/payment of money on your behalf

How we collect information about you

- **When you visit our Website**
 - Cookies are present to store statistical details (See Cookie Section)
 - Google Analytics identity general data on what pages users access and how long they stay
 - You might submit Enquiries, Make Bookings or Make a payment through 3rd Party Secure sites
 - Your payments are processed via a virtual terminal - You can view their privacy policy

[here](#)

- Contact Us Form
- Newsletter Sign Up Form
- **When you use the professional services that we provide**
 - Details noted when you make enquiry by face to face calls, phone, email or via website
 - Third party and internal Forms (such as new client documentation, Revenue registration, accounts preparation, VAT and other taxation returns, CRO forms & company incorporation forms) used in respect of services provided.
 - Details required relating to contractual and compliance obligations – engagement letters and retention of books and records.
 - Provision of payroll services data on behalf of clients.
 - Photography may be taken at business events but any use is consent based
- **When you provide us with Consent to send you regular updates**
 - Email Consent
 - Newsletter Sign Up Form on Website
 - Hardcopy Written Consent
- **When you visit or engage with our Social Media platforms**
 - Engagement (Facebook/Twitter/LinkedIn etc)

The specific details we collect

- **First Name, Last Name**
- **Contact information including email address and telephone number**
- **Company Role if Applicable**
- **Company number or Home Address and Billing address**
- **PPS number**
- **Company and business name registration and numbers**
- **Books and records in respect of preparing accounts and taxation returns.**
- **Newsletter subscription (only if you have opted-in)**
- **Transaction data in respect of payment of our fees**
- **Banking Details (but we do not store sensitive payment data)**
- **Cookies (please refer to Cookie Policy section)**
- **Google Analytics (no personal identifiable information is passed on - all information is anonymised)**

Website Cookie Policy

Our website uses 'cookie' technology. A cookie is a little piece of text that our server places on your device when you visit any of our websites or apps. They help us make the sites work better for you.

The only function of cookies associated with our website is to track hits so as to monitor the parts of the site which are of most interest to visitors and to enable adjustments to be made to suit those requirements. No information is retained for any other purpose.

[Note: You can change the settings on your browser to refuse all cookies. However, you should note that disabling cookies may result in some parts of the site not working efficiently or in slower downloads].

For further information about cookies and how to control their use, please visit the following third party educational resources: <http://www.allaboutcookies.org> and <http://www.youronlinechoices.eu>

Sharing of personal data

The policy of Brian P Buckley & Co T/A BPB Accountants is not to Share your Personal Data with 3rd Parties. However – from time to time – we may be required to pass your data to 3rd parties as outlined below.

Please note – this will be clarified to you at the time that the data is collected and will either be done so as to provide you with a better service – or because it is legally required to do so.

- Specific Staff will have access to your data to process the required paperwork and undertake the necessary administration in respect of preparation and submission of annual returns as part of the service we provide on your behalf.
- Our staff will receive your data (contact details & role details) to contact you to ensure the work is tailored to your specified requirements
- Our regulatory body may receive your data for the purposed of reviewing assessments and processing certification
- Specific Government Departments or 3rd Party Organisations such as LEO may receive your data with your consent in relation to issue around the application for funding.
- Revenue Commissioners may receive details for tax compliance reasons
- The CRO may receive the details for company secretarial compliance reasons.
- Other state organisations may receive details in compliance with Anti-Money Laundering obligations as outlined in our engagement letter

Contractor & Third Party data protection compliance

We expect and actively require any Third Parties with whom we work to be compliant with their legal obligations under Data Protection.

It is our policy to require all contractors or those who may come into contact with any Personal Data we hold to show GDPR compliance via self assessment and audit through our Supplier Data Protection Checklist. We will store this checklist for the duration of our working relationship with that 3rd party (+ 12 months)

How we keep your Information Safe

We take appropriate measures under the laws that apply, to ensure your data is safe.

- **IT**
 - Emails & other Electronic Data is stored in secure cloud system
 - Database is a Cloud Based secure application
 - Non cloud based software applications are backed up.
 - AntiVirus Software is used on all IT Systems
 - Encryption is enabled on all systems holding Personal Data
 - A Firewall assists against Network Intrusion
 - WiFi is secure
- **Document Storage**
 - Documents are stored in a locked Office in Individual covered Files
 - Data is managed Safely and not left in areas where non relevant employees can access
 - Any data which might be viewed as in any way sensitive is stored in in a separate locked office.
- **Printing**
 - Printing is queued, completed and taken with Individual Employee to ensure only the who prints the document can retrieve it.

- **CCTV**
 - We do not record or retain CCTV footage however Carlow Gateway Business Centre from whom our offices are rented do use CCTV systems which may include your personal data.

- **Data Disposal**
 - Although Brian P Buckley & Co T/A BPB Accountants does not hold sensitive data, it is our policy to engage with a GDPR Compliant Professional Shredding Company and safely/securely dispose of the Personal Data we hold to ensure compliance – see section on Data disposal

- **Calls relating to Personal Data**
 - If you contact us about your information, we may need to ask you to identify yourself and furnish proof of identity – this is to help protect your information.

How long do we keep your personal data

We have policy based and regulatory obligations that mean we must keep your data while you are a client and for certain periods of time after you stop being a client. Those periods depend on the nature of the work we have done for you.

- Client - Books and records
 - Where you do not request return of your books and records, we retain this data for 6 years in accordance with legislative obligations
- Payroll Data
 - We retain client payroll data for 6 years in accordance with legislative obligations.
- Legal Obligations
 - NERA & Revenue – 6 Years

What is the legal basis on which we gather and hold your information ?

To use your information lawfully, we rely on one or more of the following legal bases:

- Performance of a contract
- Legal obligation
- Protecting the vital interests of you or others
- Public interest
- Our legitimate interests
- Your consent

To meet our regulatory and legal obligations, we collect some of your personal information, verify it, keep it up to date through regular checks, and delete it once we no longer have to keep it. We may also gather information about you from third parties to help us meet our obligations.

If you do not provide the information we need, or help us keep it up to date, we may not be able to provide you with our services.

Disposal of Personal Data

Once the period of stated storage is complete, or based on a request to delete personal data (presuming we have no legal or statutory obligation to retain it) – it is our policy to have your personal data securely disposed of – through scheduled contracts with our professional shredding company.

This service will dispose of personal data such as has been collected.

Data will be securely deleted from the following media:

- Paper Based Files
- CRM & Database Systems
- Electronic Storage – including Hard Disks, External Hard Drives, Memory Sticks & Email
- BackUp Data will be deleted also in relation to these files

Consent

Sometimes we need your consent to use your personal information.

With direct marketing for example, we need your consent to make you aware of services which may be of interest to you.

We may do this by phone, post, email, text or through other digital media.

It is our policy to keep, in as far as is possible, a documented record of this consent.

At the end of a course or piece of work for you, we may contact you to give and get feedback.

We will generally provide options at this point in relation to how you might provide consent or otherwise for us to contact you with updates and other items of interest.

Breach Reporting

The DPO will conduct regular inspections and maintain a systematic audit schedule to monitor compliance and Brian P Buckley & Co T/A BPB Accountants will actively record and report any Breaches in relation to Data Protection.

Any employee, client or 3rd party can alert the DPO to the breach, who will update the Breach Log before identifying the breach type and evaluating any risk associated with the breach.

Where there is a possibility of risk, and where the personal data breached is neither Encrypted or Anonymised, the DPO will report the breach to the DPC, and depending on the severity/urgency of the risk – may also notify the data subject. This will be done as soon as possible – and within the required 72 hour limit.

Staff Awareness & Training

Training sessions have been completed with all staff in advance of the GDPR arrival date of 25/05/18

All future induction sessions will include a specific session on data protection.

Your Data Rights

You can exercise your rights by contacting us on 059 9179666, emailing us on info@bpb.ie or calling into our Office - Brian P Buckley & Co T/A BPB Accountants, Carlow Gateway Business Centre, Athy Road, Carlow, Co. Carlow.

Whenever you contact us to ask about your information, we may ask you to identify yourself. This is to help protect your information.

Your right to obtain information cannot adversely affect the rights and freedoms of others. Therefore, we cannot provide information on other people without consent. (See Sharing of Data for further details)

We generally do not charge you when you contact us to ask about your information. However, if requests are deemed excessive or manifestly unfounded, we may charge a reasonable fee to cover the additional administrative costs or choose to refuse the requests.

The following section details your information rights and how we can help ensure that you are aware of these rights, how you can exercise these rights and how we intend to deliver on your requests.

1. You can ask us for a copy of the personal information we hold and further details about how we collect, share and use your personal information

If you want to update or correct any of your personal details, please contact us at on **059 9179666**, emailing us on info@bpb.ie or calling into our Office - **Brian P Buckley & Co T/A BPB Accountants, Carlow Gateway Business Centre, Athy Road, Carlow, Co. Carlow.**

2. You can change your mind wherever you have given us your consent, such as for processing your information.
3. You may have the right to restrict or object to us processing your personal information. We will require your consent to further process this information once restricted. You can request restriction of processing where;
 - The personal data is inaccurate and you request restriction while we verify the accuracy
 - The processing of your personal data is unlawful
 - You oppose the erasure of the data, requesting restriction of processing instead
 - You require the data for the establishment, exercise or defense of legal claims but we no longer require the data for processing
 - You disagree with the legitimate interest legal basis and processing is restricted until the legitimate basis is verified

You may ask us to delete your personal information or we may delete your personal information under the following conditions:

- The personal data is no longer necessary in relation to the purposes for which it was collected or otherwise processed;
- You withdraw your consent where there is no other legal ground for the processing
- You withdraw your consent for direct marketing purposes
- You withdraw your consent for processing a child's data
- You object to automated decision making
- The personal data has been unlawfully processed
- The personal data has to be erased for compliance with a legal obligation.
- You declare to us that you are no longer a client of ours

Data Protection Feedback, Further Information & Complaints

If you have a complaint about the use of your personal information, please let a member of staff in our Office know, giving them the opportunity to put things right as quickly as possible.

If you wish to make a complaint you may do so in person, by phone and in writing or by email. We will fully investigate all the complaints we receive. We ask that you supply as much information as possible to help us resolve your complaint quickly.

You can also contact the Office of the Data Protection Commissioner in Ireland on the below details:

Visit their website www.dataprotection.ie.

Email info@dataprotection.ie

Phone on +353 (0)57 8684800 or +353 (0)761 104 800

Write to Data Protection Office, Canal House, Station Road, Portarlinton, Co. Laois, R32 AP23. Or 21 Fitzwilliam Square, Dublin 2, D02 RD28, Ireland.

Review

This Data Protection Policy will be reviewed regularly in light of any legislative or other relevant developments. We will inform you of any changes to our Privacy Policy in the future.