



Vincent & Co Privacy Statement

Who We Are

Vincent & Co works with all kinds of businesses, providing a wide range of accounting and tax services. In addition, we have an ever-growing community of people who seek our advice about tax issues, inheritance tax, savings and investments.

We use technology for the benefit of our clients, so while we mainly provide services for local businesses and people, we also advise clients throughout the UK and the rest of the world.

Our ethos is Working With You, Thinking With You and we build a close working relationship with each and every one of our clients.

We are passionate about confidentiality so we make sure every meeting and all our records meet our exceptionally high standards of protection.

The Personal Information We Collect

Personal information includes your name, address, telephone number and other information that is not otherwise publicly available. We collect personal information about you when you contact us about products and services, visit a financial advisor, visit our website or agree to receive our newsletter.

The type of personal information we collect will depend on the purpose for which it is collected and includes:

- Contact details.
- Information to verify your identity.
- Family, lifestyle, health and financial information.
- Payment details.
- We collect personal information directly from you. For example, we ask for personal information at the start of our relationship and in subsequent communications in order to check your identity, and protect you from fraud. This is a legal requirement and is important to help safeguard you against potential crime.

Cookies

We also collect information about you from other sources. For example, our website automatically collects information from your computer using “cookies” which provides us with limited personal information. Cookies are small text files that are placed on your 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 website owners. For further information visit www.aboutcookies.org or www.allaboutcookies.org.

You can set your browser not to accept cookies and the above websites tell you how to remove cookies from your browser. However, in a few cases some of our website features may not function as a result.

How We Use Your Personal Information

We process your information in order to support and maintain our contractual relationship with you and to comply with legal and regulatory requirements. This includes the following:

- Providing our advice, products or services to you.
- Carrying out transactions you have requested.
- Confirming and verifying your identity for security purposes.
- Credit scoring and assessment, and credit management (where applicable).
- Detecting and preventing fraud, crime, money laundering or other malpractice.

We also process your data for specific business purposes to enable us to give you the best products and services and the best and most secure experience. For example, we process your information to send you marketing that is tailored to your interests. Our business purposes include the following:

- Enhancing, modifying, and personalising our services for the benefit of our customers.
- Providing communications which we think will be of interest to you.
- Market or customer satisfaction research or statistical analysis.
- Audit and record keeping purposes.
- Enhancing the security of our network and information systems.

You have the right to object to this processing if you wish, please see “YOUR RIGHTS” section below. Please bear in mind that if you object this may affect our ability to carry out the tasks above for your benefit.

You have the right to opt out of marketing information and tell us what your communication preferences are by contacting us using the details provided at the end of this notice or by using the opt out option below or on any email marketing. You may opt out at any time if you do not wish to receive any further communications of this nature.

Where Information is Stored and For How Long

We have measures in place to protect the security of all personal information that we hold and keep it confidential. We review these measures regularly to make sure they remain appropriate. When sharing personal information with a third party, we will make sure that they also have measures in place to protect it and keep it confidential and agree to use the personal information only for the purposes we set out.

We will only keep personal information for as long as we need it in order to fulfil the purposes for which it was collected and for so long after as we consider may be required to deal with any questions or complaints that we may receive about our relevant activities, unless we elect to retain the personal data for a longer period to comply with our legal and regulatory obligations.

We review the personal data we hold on a regular basis. If we conclude that certain personal data is no longer needed, that personal data will be destroyed.

Your Rights

- Anyone has the right to see the personal data that is held about them and have a copy provided to them, or someone else on their behalf.
- If at any point anyone believes that the personal data we hold about them is inaccurate, that person can ask to have it corrected.
- Anyone can require us to limit the processing of their personal data in certain circumstances, for example, whilst a complaint about its accuracy is being resolved.
- Anyone can object to their personal data being processed.
- Where someone has given us their consent to process their personal data, they can withdraw that consent at any time by notifying us (see "Who to Contact" below).
- Anyone can request that their personal data is deleted altogether.
- In some circumstances, there is a right to have your information provided in a machine-readable format to ensure the portability of your personal data to other service providers.

It should be noted that taking any of these steps could impact upon our ability to continue our relationship with you, the provision of our services to you and our ability to answer questions relating to our services to you. Please note some of above rights are dependent on the legal basis for processing.

Personal information will generally be provided free of charge.

Who to Contact

If you wish to see your personal data, exercise any of the rights mentioned above or make a complaint about how we have handled your personal data, please email office@vincent.co.uk

We encourage you to let us know if your personal information changes or if you think the personal information we hold about you is out of date.

Vincent & Co
37 Shiphay Lane
Torquay
Devon
TQ2 7DU

www.vincent.co.uk

Tel: 01803 500500
Email: office@vincent.co.uk

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