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# Privacy Policy

## Privacy Policy for Clients and Suppliers

Perfect Sums Bookkeeping And Accounts Ltd is the trading name of Perfect Sums Limited. Our Limited company registration number is: 11837113 and our registered office address is 7 Hen Wythva Parc, Camborne Cornwall, TR14 7TB.

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 the privacy notice.

## Purpose of this Privacy Policy

The purpose of this privacy statement is to explain how Perfect Sums Ltd manages your personal data if you are not an employee of Perfect Sums Ltd, in accordance with the General Data Protection Regulation (GDPR), the Data Protection Act 2018 and any other national implementing laws, regulations and secondary legislation.

Please note that this Privacy Policy may be amended from time to time, in line with any updates in the UK's Data Protection Legislation. Please read our Privacy Policy carefully to understand our practices regarding your personal data and how we will treat it.

# Why Perfect Sums needs your data

## If you are a Client

Perfect Sums Ltd needs your personal data so that we can contact you about a contract you have with Perfect Sums, or about our products and services you are interested in. By using any of our Perfect Sums services you are accepting that you would like to be contacted for contract fulfilment, legitimate interest and/or consent.

## If you are a Supplier

Perfect Sums Ltd needs your personal data so that we can contact you about a contract we have with you, or about your products and services that Perfect Sums is interested in.

## How we collect your data

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

- You request a proposal from us in respect of the services we provide
- Your employer or our client engages us to provide our services and contract fulfilment
- You contact us by email, telephone, post or via social media (for example when you have a query about our services) or from third parties such as your employer or from Companies House.

### **What personal data do we collect?**

The personal data Perfect Sums Ltd needs about you is your basic contact information:

- Your name and your company job title, position, or role
- Your company's name and your company address
- Your company telephone number and/or your company email address
- Your consent to receive communications by email
- Your payment details
- Your financial details such as bank account numbers
- Tax details such as tax codes, unique tax references, national insurance number and salary
- Details of any services/contracts that you receive from us
- Information regarding any compliant and enquiries you make with us
- Information from research, surveys, and marketing activities
- Information we receive from other sources, such as publicly available information, information provided by your employer or our clients.

### **How Perfect Sums uses your data**

If Perfect Sums Ltd has your personal data, then your data is stored in a single secure private database on Perfect Sums Ltd's servers with no third party access.

Perfect Sums may process your personal data for the purposes necessary for the performance of our contract with our clients. Employees of Perfect Sums may use your data if they need to contact you by letter, telephone, or email to fulfil our contract and comply with our legal obligations.

If you have an enquiry, or contract with Perfect Sums Ltd then its employees may contact you from time to time about the matter to fulfil our contract with you or legitimate business interests such as marketing, business development, statistical and management purposes.

If you have actively consented to receive marketing communications by email from Perfect Sums Ltd, then we will include you in our email marketing campaigns that we believe you will be interested in based on the profile of you and your company. If you have withdrawn all your consents, then we will not include you in any further email marketing campaigns from Perfect Sums Ltd.

### **Situations where we will use your personal data**

- Carry out obligations arising from any agreements entered between you or your employer or our clients and us which will usually be for the provision of our services
- Carry out obligations arising from any agreements entered into between our clients and us which will usually be for the provision of our services where you may be a subcontractor, supplier or customer of our client

- Provide you with information related to our services and our events and activities that you request from us or which we feel may interest you, provide you have consented to be contracted for such purposes
- Seek your thoughts and opinions on the services we provide
- Notify you about any changes to our services

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

If you have an enquiry, or contract with Perfect Sums Ltd then we will keep your personal data during, and for a maximum of 7 years after the completion of, that item.

If you have indicated consent to receive marketing communications by email then we will keep your personal data for as long as your consent remains in place, and for a maximum of 1 year after you have withdrawn all your consents.

## Data Sharing

### **Why might you share my personal data with third parties?**

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 and our clients and suppliers.

### **Which third party service providers process my personal data?**

Perfect Sums uses third party service providers to complete our contracts with our clients, the following activities are carried out by third party providers: IT and Cloud services, professional advisory services, administration services and payroll processing 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.

We may 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 unauthorized 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.

We have put in place procedures to deal with any suspected data security breaches and will notify you and any applicable regulator of a suspected breach where we are legally required to do so.

### **Your rights**

You can adjust or withdraw your consent to receive marketing communications by email at any time at [admin@perfectsums.co.uk](mailto:admin@perfectsums.co.uk).

You can tell Perfect Sums Ltd of any corrections to the personal data it holds about you. Perfect Sums will ensure that your corrections will be corrected.

You can tell Perfect Sums Ltd to delete your personal data and if your details are not stored for reasons of contract fulfilment or legitimate interest and then you can expect Perfect Sums Ltd to delete it.

### **Queries regarding your data**

Should you have any queries regarding your data that we hold please contact our Data Controller/Data Protection Officer (DPO) on [admin@perfectsums.co.uk](mailto:admin@perfectsums.co.uk) or 01209 294100.

### **How to complain**

If you wish to complain about Perfect Sums Ltd's record of your personal data, then please contact [team@perfectsums.co.uk](mailto:team@perfectsums.co.uk).

If you are not satisfied with Perfect Sums Ltd response or believe that we are processing your data incorrectly you can complain directly to the Information Commissioners Office (ICO).