

Privacy Notice for Griffiths Marshall

Griffiths Marshall takes your privacy very seriously. We are committed to protecting your personal data in accordance with the Data Protection Act 2018 (DPA 2018) and the General Data Protection Regulations (GDPR). We process personal data for several purposes, and the means of collection, lawful basis of processing, use, disclosure, and retention periods for each purpose may differ.

How do we collect information from you?

We obtain information about you when you engage us to deliver our services and/or when you use our website, for example, when you contact us about our services.

What type of information do we collect?

The personal information we collect from you will vary depending on which services you engage us to deliver. It might include your name, address, telephone number, email address, date of birth, your Unique Tax Reference (UTR) number, your National Insurance number, bank account details and your IP address.

Our policy is to collect only the personal data necessary for agreed purposes and we ask clients to only share personal data where it is strictly needed for those purposes. We collect personal data from our clients or from third parties acting on the instructions of the relevant client.

How is your information used?

We process personal data to provide professional services such as tax advice, or general or specific business advice as part of the range of services we offer. We also process personal data in the administration and management of our business.

Your business contact details are used to provide you with information about our services and other information which we think will be of interest to you, unless you tell us not to.

We are subject to legal, regulatory and professional obligations. We need to keep certain records to demonstrate that our services are provided in compliance with those obligations and those records may contain personal data.

Retention of data

We keep the personal data that we process for as long as is considered necessary for the purpose for which it was collected. We are required by legislation, other regulatory requirements and our insurers to retain your data where we have ceased to act for you. To ensure compliance with all such requirements it is the policy of the firm to retain all records and other documentary evidence created in the provision of services for a period of seven years from the end of the period concerned. We may retain certain records for a longer

period of up to 15 years to meet potential obligations arising under the Statute of Limitations Act 1980.

Who has access to your information?

We take the security of your data we hold seriously. We have a policy including procedures and training in place covering data protection, confidentiality and security and regularly review the appropriateness of the measures we have in place to keep the data we hold secure.

We will not sell or rent your information to third parties, or share your information with third parties for marketing purposes.

Any staff member with access to your information has a duty of confidentiality under the ethical standards that this firm is required to follow.

Third Party Service Providers working on our behalf

We may pass your information to our third party service providers, agents, subcontractors and other associated organisations for the purposes of completing tasks and providing services to you or your employees on our behalf, for example to process payroll or basic bookkeeping. However, when we use third party service providers, we disclose only the personal information that is necessary to deliver the service and we have a contract in place that requires them to keep your information secure and not to use it for their own purposes.

Please be assured that we will not release your information to third parties unless you have requested that we do so, or we are required to do so by law, for example, by a court order or for the purposes of prevention and detection of crime, fraud or corruption.

Security precautions to protect your information

Whilst we strive to protect your personal information, we cannot guarantee the security of any information you transmit to us, and you do so at your own risk.

Once we receive your information, we make our best effort to ensure its security on our systems. Where we have given, or where you have chosen, a password which enables you to access information, you are responsible for keeping this password confidential. We ask you not to share your password with anyone.

Your data will usually be processed in our office in the UK. However, to allow us to operate efficient digital processes, we sometimes need to store information in servers located outside the UK, including in countries outside the European Union ("EU). We take the security of your data seriously and so all our systems have appropriate security in place that complies with all applicable legislative and regulatory requirements.

Your Rights

Accessing your data

You have the right to ask for a copy of the information Griffiths Marshall holds about you, and you can exercise that right by contacting us below. Our aim is to respond a request promptly and within the legally required limit of 40 days.

Updating your personal data

Keeping your information up to date and accurate is important to us. We commit to regularly review and correct where necessary, the information that we hold about you. If any of your information changes, please email or write to us, or call us using the contact information noted below. Once we are informed that any personal data held by us is no longer accurate we will make changes based on your updated information.

Deletion of your information

You have the right to ask us to delete personal information about you where:

- you consider that we no longer require the information for the purposes for which it was obtained
- you have validly objected to our use of your personal information - see 'Objecting to how we use your information' below
- our use of your personal information is contrary to law or our other legal obligations
- we are using your information with your consent and you have withdrawn your consent - see 'Withdrawing your consent' below.

Restricting how we use your information

In some cases, you may ask us to restrict how we use your personal information. This right might apply, for example, where we are checking the accuracy of personal information about you that we hold or assessing the validity of any objection you have made to our use of your information. The right might also apply where there is no longer a basis for using your personal information but you do not want us to delete the data. Where this right is validly exercised, we may only use the relevant personal information with your consent, for legal claims or where there are other public interest grounds to do so.

Objecting to how we use your information

Where we use your personal information to perform tasks carried out in the public interest then, if you ask us to, we will stop using that personal information unless there are overriding legitimate grounds to continue. You have the right at any time to require us to stop using your personal information for direct marketing purposes.

Withdrawing your consent

Where we use your personal information with your consent such as to send you monthly email newsletters, you may withdraw that consent at any time and we will stop using your personal information for the purpose(s) for which consent was given.

Please contact us in any of the ways set out in contact information below if you wish to exercise any of these rights.

Changes to our privacy notice

We keep this privacy notice under regular review and will place any updates on www.griffithsmarshall.co.uk. Paper copies of the privacy notice are also available on request.

This privacy notice was last updated on 1 May 2025.

Complaints

If you wish to complain about our use of your personal data, please contact us with the details of your complaint and we will seek to resolve this directly. You also have the right to register a complaint with the Information Commissioner's Office (ICO). For further information on your rights and how to complain to the ICO, please refer to their website at <https://ico.org.uk/concerns>.

Contact information

If you have any questions about this privacy notice or how and why we process personal data, please contact us at:

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4th Floor, Llanthony Warehouse
The Docks
Gloucester
GL1 2EH

Tel: (01452) 520000

Email: info@griffithsmarshall.co.uk