



Privacy Statement

Introduction

The information you have provided to us is subject to the **General Data Protection Regulation (EU) 2016/679**. (GDPR)

We are KM Business Solutions Ltd a company registered in England and Wales (Company No. 03901337 with its registered office at 1st Floor, Block C, The Wharf, Manchester Road, Burnley, BB11 1JG , (KMBS”, “we”, “us”, or “our”).

We are a “Data Controller” for the purposes of the current Data Protection Act 1998 and we will remain so under the GDPR and the legislation replacing the 1998 Act whilst undertaking our services. We are classed as a “Data Controller” because of our professional obligations which means we may have to exercise our judgment and act outside of client instructions should our professional obligations dictate.

KMBS is strongly committed to protecting personal data. This privacy statement describes why and how we collect and use personal data and provides information and individual’s rights. It applies to personal data provided to us, both by individuals themselves or others. We may use personal data provided to us for any of the purposes described in this privacy statement or as otherwise stated at the point of collection.

Personal data is any information relating to an identified or identifiable living person. KMBS processes personal data for numerous purposes, and the means of collection, lawful basis for processing, use, disclosure, and retention periods for each purpose may differ.

When collecting and using personal data, our policy is to be as transparent about why and how we process personal data. To find out more about our specific processing activities, please go to the relevant sections of the statement.

Whilst the data we collect, the purposes and how they apply to you differ depending whether you are: a personal client, a corporate client, a business contact, a supplier or a visitor to our offices, there are commonalities with regards our security provisions, your rights and our retention policies which are discussed at the end of this policy. We therefore urge you to read this policy in its entirety and not just the small section pertaining to you.

Data Protection Principles

We will comply with data protection law and principles, which means that your information will be:

- Used lawfully, fairly and in a transparent way;
- Collected only for valid purposes that we have clearly explained to you and not used in any way that is incompatible with those purposes;
- Relevant to the purposes we have told you about and limited only to those purposes;
- Accurate and kept up to date;
- Kept only as long as necessary for the purposes we have told you about; and
- Kept securely.

Personal Clients (and individuals associated with our clients)

Collection of personal data

Our policy is to collect only the personal data necessary for agreed purposes and we ask our clients to only share personal data where it is strictly necessary for agreed purposes and we ask our clients only to share personal data where it is strictly needed for those purposes.

Where we need to process personal data of other data subjects other than our client to provide our services, we ask our clients to provide the necessary information to other data subjects concerned, such as family members, regarding its use.

Given the diversity of the services we provide to personal clients, we process many categories of personal data, including as appropriate for the services we are providing:

- Contact details (including name, address, email address, telephone number);
- Business activities;
- Family information;
- Income, taxation and other financial related details;
- Investments and other financial interests.
- Records of your correspondence with us

For certain services or activities, and when required by law or with an individual's consent, we may also collect special categories of personal data. Examples of special categories include race or ethnic origin; political opinions; religious or philosophical beliefs; trade union membership; physical or mental health; genetic data; biometric data; sexual orientation; and, criminal records.

Generally, we collect personal data from our clients or from a third party acting on the instructions of a relevant client. This information will generally be gathered from direct interactions by telephone, email or phone.

Use of personal data

We will only use your personal information when the law allows us to. Most commonly, we will use your personal data in the following circumstances.

- Where we need to perform the contract, we are about to enter into or have entered into with you;
- Where it is necessary for our legitimate interests (or those of a third party) and your interests and fundamental rights do not override those interests; or
- Where we need to comply with a legal or regulatory obligation.

Generally, we do not rely on consent as a legal basis for processing your personal information other than in relation to sending third party direct marketing communications to you via email. You have the right to withdraw consent to such marketing at any time.

We use personal data for the following purposes:

- **Providing professional services**

We provide a diverse range of professional services. Some of our services require us to process personal data in order to provide advice and deliverables. For example, we need to use personal data to provide individual tax advice.

- **Administering, managing and developing our business and services**

We process personal data in order to run our business, including:

- a) managing our relationships with clients;
- b) developing our businesses and services (such as identifying client needs and improvements in service delivery);
- c) Maintaining and using IT systems;
- d) Hosting or facilitating the hosting of events; and
- e) Administering and managing our website and systems and applications.

- **Security, quality and risk management activities**

We have security measures in place to protect our and our clients' information (including personal data) which involve detecting, investigating and resolving security threats. Personal data may be processed as part of the security monitoring that we undertake; for example, automated scans to identify harmful emails. We have policies and procedures in place to monitor the quality of our services and manage risks in relation to client engagements.

We collect and hold personal data as part of our engagement acceptance, we carry out searches using publicly available sources (such as internet searches and sanctions lists) to identify politically exposed persons and heightened risk individuals and organisations and check that there are no issues that would prevent us from working with a particular

client (such as sanctions, criminal convictions (including in respect of company directors), conduct or other reputational issues).

- **Providing our clients with information about us and our range of services**

With consent or otherwise in accordance applicable law, we use client contact details to provide information that we think will be of interest about us and our services. For example, industry updates and insights, other services that may be relevant and invites to events.

- **Complying with any requirement of law, regulation or a professional body of which we are a member**

As with any provider of professional services, 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.

We are continually looking for ways to help our clients and improve our business and services. Where agreed with our clients, we may use information that we receive in the course of providing professional services for lawful purposes, including analysis to better understand a particular issue, industry or sector, provide insights back to our clients, to improve our business, service delivery and offerings and to develop new KMBS technologies and offerings. To the extent that the information that we receive in the course of providing professional services contains personal data, we will de-identify the data prior to using the information for these purposes.

If you fail to provide personal information

If you fail to provide certain information when requested either by law, or under the terms of a contract we have with you and you fail to provide that information when requested, we may not be able to perform the services you request from us. In this case, we may have to cancel a service you have with us, but we will notify you if this is the case at the time.

Change of purpose

We will only use your personal information for the purposes for which we collected it, unless we reasonably consider that we need to use it for another reason and that reason is compatible with the original purpose. If we need to use your personal information for an unrelated purpose, we will notify you and we will explain the legal basis which allows us to do so.

Corporate clients (and individuals associated with our corporate clients)

Collection of personal data

Our policy is to collect only the personal data necessary for agreed purposes and we ask our clients to only share personal data where it is strictly needed for these purposes.

Where we need to process personal data to provide professional services, we ask our clients to provide the necessary information to the data subjects regarding its use. Our clients may use relevant sections of this privacy statement or refer data subjects to this privacy statement if they consider it appropriate to do so.

Generally, we collect personal data from our clients or from third parties acting on the instructions of the relevant client.

Use of personal data

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- **Providing professional services**

We provide a diverse range of professional services. Some of our services require us to process personal data in order to provide advice and deliverables. For example, we need to use personal data to provide individual tax advice.

- **Administering, managing and developing our business and services**

We process personal data in order to run our business, including:

- a. managing our relationships with clients;
- b. developing our businesses and services (such as identifying client needs and improvements in service delivery);
- c. Maintaining and using IT systems;
- d. Hosting or facilitating the hosting of events; and

e) Administering and managing our website and systems and applications.

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- **Providing our clients with information about us and our range of services**

With consent or otherwise in accordance applicable law, we use client contact details to provide information that we think will be of interest about us and our services. For example, industry updates and insights, other services that may be relevant and invites to events.

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We are continually looking for ways to help our clients and improve our business and services. Where agreed with our clients, we may use information that we receive in the course of providing professional services for lawful purposes, including analysis to better understand a particular issues, industry or sector, provide insights back to our clients, to improve our business, service delivery and offerings and to develop new KMBS technologies and offerings. To the extent that the information that we receive in the course of providing professional services contains personal data, we will de-identify the data prior to using the information for these purposes.

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Change of purpose

We will only use your personal information for the purposes for which we collected it, unless we reasonably consider that we need to use it for another reason and that reason is compatible with the original purpose. If we need to use your personal information for an unrelated purpose, we will notify you and we will explain the legal basis which allows us to do so.

Business Contacts

Collection of personal data

KMBS processes personal data about contacts (existing and potential KMBS clients and/or individuals associated with them) using a customer relationship management system and databases.

The collection of personal data about contacts and the addition of that personal data to our databases is initiated by a KMBS user and will include name, employer name, contact title, phone, email and other business contact details. In addition, we may collect data from email (sender name, recipient name, date and time) and calendar (organiser name, participant name, date and time of events) systems concerning interactions between KMBS users and contacts and third parties.

Use of personal data

We will only use your personal information when the law allows us to. Most commonly, we will use your personal data in the following circumstances:

- Where we need to perform the contract we are about to enter into or have entered into with you;
- Where it is necessary for our legitimate interests (or those of a third party) and your interests and fundamental rights do not override those interests; or
- Where we need to comply with a legal or regulatory obligation.

Generally, we do not rely on consent as a legal basis for processing your personal information other than in relation to sending third party direct marketing communications to you via email. You have the right to withdraw consent to such marketing at any time.

Personal data relating to business contacts may be visible to and used by KMBS users to learn more about an account, client or opportunity they may have an interest in, and may be used for the following purposes.

- Administering, managing and developing our business and services
- Providing information about us and our range of services
- Making contact information available to KMBS users
- Identifying clients/contacts with similar needs
- Describing the nature of a contact's relationship with KMBS
- Performing analytics, including producing metrics for KMBS leadership, such as on trends, relationship maps, sales intelligence and progress against account business goals.

KMBS does not sell or otherwise release personal data contained in our databases to third parties for the purpose of allowing them to market their products and services without consent from individuals to do so.

Suppliers (including subcontractors and individuals associated with our suppliers and subcontractors)

Collection of personal data

We collect and process personal data about our suppliers (including subcontractors and individuals associated with our suppliers and subcontractors) in order to manage the relationship, contract, to receive services from our suppliers and, where relevant, to provide professional services to our clients.

Use of personal data

We will only use your personal information when the law allows us to. Most commonly, we will use your personal data in the following circumstances:

- Where we need to perform the contract, we are about to enter into or have entered into with you;
- Where it is necessary for our legitimate interests (or those of a third party) and your interests and fundamental rights do not override those interests; or
- Where we need to comply with a legal or regulatory obligation.

Generally, we do not rely on consent as a legal basis for processing your personal information other than in relation to sending third party direct marketing communications to you via email. You have the right to withdraw consent to such marketing at any time.

Use of personal data

We use personal data for the following purposes:

- **Receiving services**
We process personal data in relation to our suppliers and their staff as necessary to receive the services. For example, where a supplier is providing us with facilities management or other outsourced services, we will process personal data about those individuals that are providing services to us.
- **Providing professional services to clients**
Where a supplier is helping us to deliver professional services to our clients, we process personal data about the individuals involved in providing the services in order to administer and manage our relationship with the supplier and the relevant individuals and to provide such services to our clients.
- **Administering, managing and developing our business and services**
We process personal data in order to run our business, including:

- a) Managing our relationship with suppliers;
 - b) Developing our businesses and services (such as identifying client needs and improvements in service delivery);
 - c) Maintaining and using IT systems;
 - d) Hosting or facilitating the hosting of events; and
 - e) Administering and managing our website and systems and applications
- **Security, quality and risk management activities**
We have security measures in place to protect our and our clients' information (including personal data) which involve detecting, investigating and resolving security threats. Personal data may be processed as part of the security monitoring that we undertake; for example, automated scans to identify harmful emails. We have policies and procedures in place to monitor the quality of our services and manage risks in relation to our suppliers. We collect and hold personal data as part of our supplier contracting procedures. We monitor the services provided for quality purposes, which may involve processing personal data.
 - **Providing information about us and our range of services**
Unless we are asked not to, we use business contact details to provide information that we think will be of interest about us and our services. For example, industry updates and insights, other services that may be relevant and invites to events.
 - **Complying with any requirement of law, regulation or a professional body of which we are a member.**
As with any provider of professional services, 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.

Visitors to our offices

Collection of personal data

We have security measures in place at our office such as building access controls.

We require visitors to our offices to sign in at reception and keep a record of visitors for a short period of time. Our visitor records are securely stored and only accessible on a need to know basis (e.g. to look into an incident).

Visitors to our website and others who get in contact with us

Collection of personal data

We collect personal data when an individual gets in touch with us with a question, complaint, comment or feedback (such as name, contact details and contents of the communication). In these cases, the individual is in control of the personal data shared with us and we will only use the data for the purpose of responding to the communication.

Cookies

Our site uses cookies to distinguish you from other users of our Site. This helps us to provide you with a good experience when you browse our Site and also allows us to improve our Site. By continuing to browse the Site, you are agreeing to our use of cookies.

A "cookie" is a piece of information that is stored on your computer, tablet or phone to recognise your browser and which records how you have used a website. This means that when you go back to that website, it can give you tailored options based on the information it has stored about your last visit. You can normally alter the settings of your browser to prevent it from accepting cookies.

How do we use cookies?

We may use cookies to improve the way the Site works and to monitor how people use our Site. This helps us to understand how people use our Site, so we can develop and improve the design, layout and function of the Site. Our cookies do not store personally identifiable data.

The cookies we use are explained below:

Strictly necessary cookies

These cookies are essential in order to enable you to move around the Site and use its features, such as accessing secure areas of the Site. Without these cookies, services you have asked for, such as logging into your account, cannot be provided. These cookies do not gather information about you that could be used for marketing or remembering where you have been on the internet.

Functionality cookies

These cookies allow our Site to remember choices you make (such as your user name, language or the region you are in) and provide enhanced features. For instance, a website may be able to provide you with news or updates relevant to the policies you buy. These cookies can also be used to remember changes you have made to text size, font and other parts of web pages that you can customise. They may also be used to provide services you have requested such as viewing a video or commenting on a blog. The information these cookies collect is usually anonymised. They do not gather any information about you that could be used for advertising or remember where you have been on the internet.

How to reject cookies

If you do not wish to receive cookies that are not strictly necessary to perform basic features of our Site, you can set your browser to reject cookies or to tell you when a website tries to put a cookie on your computer.

Note that most web browsers will accept cookies, but if you would rather that we did not collect data in this way you can choose to accept all or some or reject cookies in your

browser's privacy settings. Rejecting all cookies means that certain features on the Site cannot then be provided to you and accordingly you may not be able to take full advantage of all our Site's features. The "Help" menu in the bar of most browsers will tell you how to prevent your browser from accepting new cookies, how to have the browser notify you when you receive a new cookie and how to disable cookies altogether. Additionally, you can disable or delete similar data used by browser add-ons, such as Flash cookies, by changing the add-ons settings or visiting the website of its manufacturer.

More information

For more information generally on cookies and how to disable them please go to the Information Commissioner's webpage on cookies: <https://ico.org.uk/for-the-public/online/cookies>.

Security

We take the security of all the data we hold very seriously. We adhere to recognised security standards and our information security system relating to client confidential data meets and is accredited by Cyber Essentials. We have a framework of policies, 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.

In particular, we have put in place appropriate security measures to prevent your personal information from being accidentally lost, used or accessed in an unauthorised way, altered or disclosed. In addition, we limit access to your personal information to those employees, agents, contractors and other third parties who have a business need to know. They will only process your personal information 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 breach and will notify you and any applicable regulator of a suspected breach where we are legally required to do so.

When and how we share personal data and locations of processing

We will only share personal data with others when we are legally permitted to do so. When we share personal data with others, we put in contractual arrangements and security mechanisms in place to protect the data and to comply with our data protection, confidentiality and security standards. Further, they must process the personal data in accordance with this Privacy Policy and as permitted by the GDPR, the Data Protection Act 1998 and subsequently the Data Protection Act 2018 (subject to royal assent), the Privacy and Electronic Communications (EC Directive) Regulations 2003 and the E-Privacy Regulations when it comes into effect.

We use third parties located in other countries to help run our business. As a result, personal data may be transferred outside the UK but not outside the European Union.

Third party organisations that provide applications/functionality, data processing or IT services to us.

We use third parties to support us in providing our services and to help provide, run and manage our internal IT systems. For example, providers of information technology, cloud-based software as service providers, identity management, website hosting and management, data analysis, data back-up, security and storage services. The servers powering and facilitating the cloud infrastructure are located in secure data servers around the world, and personal data may be stored in any one of them.

Third party organisations that otherwise assist us in providing goods, services or information

Auditors and other professional advisors

Law enforcement or other government or regulatory agencies or to other third parties as required by, and in accordance with applicable law or regulation

Occasionally, we may receive requests from third parties with authority to obtain disclosure of personal data, such as to check that we are complying with applicable law and regulation, to investigate an alleged crime, to establish, exercise or defend legal rights. We will only fulfil requests for personal data where we are permitted to do so in accordance with applicable law or regulation.

Data Retention

We will only retain your personal information for as long as necessary to fulfil the purposes we collected it for, including for the purposes of satisfying any legal, accounting, or reporting requirements.

To determine the appropriate retention period for personal data, we consider the amount, nature, and sensitivity of the personal data, the potential risk of harm from unauthorised use or disclosure of your personal data, the purposes for which we process your personal data and whether we can achieve those purposes through other means, and the applicable legal requirements.

In the absence of specific, regulatory or contractual requirements, our baseline retention period for records and other documentary evidence created in the provision of services is 6 years.

It is important that the personal information we hold about you is accurate and current. Please keep us informed if your personal information changes during your business relationship with us.

Under certain circumstances, by law you have the right to:

- Request access to your personal information (commonly known as a "data subject access request"). This enables you to receive a copy of the personal information we hold about you and to check that we are lawfully processing it.

- Request correction of the personal information that we hold about you. This enables you to have any incomplete or inaccurate information we hold about you corrected.
- Request erasure of your personal information. This enables you to ask us to delete or remove personal information where there is no good reason for us continuing to process it. You also have the right to ask us to delete or remove your personal information where you have exercised your right to object to processing (see below).
- Object to processing of your personal information where we are relying on a legitimate interest (or those of a third party) and there is something about your particular situation which makes you want to object to processing on this ground. You also have the right to object where we are processing your personal information for direct marketing purposes.
- Request the restriction of processing of your personal information. This enables you to ask us to suspend the processing of personal information about you, for example if you want us to establish its accuracy or the reason for processing it.
- Request the transfer of your personal information to another party.

If you want to review, verify, correct or request erasure of your personal information, object to the processing of your personal data, or request that we transfer a copy of your personal information to another party, please email info@kmaccountants.co.uk. Please note, there are some specific circumstances where these rights do not apply, and we can refuse to deal with your request

You will not have to pay a fee to access your personal information (or to exercise any of the other rights). However, we may charge a reasonable fee if your request for access is clearly unfounded or excessive. Alternatively, we may refuse to comply with the request in such circumstances.

We may need to request specific information from you to help us confirm your identity and ensure your right to access the information (or to exercise any of your other rights). This is another appropriate security measure to ensure that personal information is not disclosed to any person who has no right to receive it.

Right to withdraw consent

In the limited circumstances where you may have provided your consent to the collection, processing and transfer of your personal information for a specific purpose, you have the right to withdraw your consent for that specific processing at any time. To withdraw your consent, please email info@kmaccountants.co.uk. Once we have received notification that you have withdrawn your consent, we will no longer process your information for the purpose or purposes you originally agreed to, unless we have another legitimate basis for doing so in law.

Complaints

We hope you won't ever need to , but if you want to complain about our use of personal data, please send an email with the details of your complaint to info@kmaccountants.co.uk. We will look into and respond to any complaints we receive.

You also have the right to lodge a formal complaint with the Information Commissioner's Office ("ICO") (the UK data protection regulator). For further information on your rights and how to complain to the ICO, please refer to the ICO website. ico.org.uk

Data Controller and contact information

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

Data Protection Officer
KM Business Solutions Ltd
1st Floor, Block C, The Wharf,
Manchester Road,
Burnley BB11 1JG.
Email: info@kmaccountants.co.uk
Phone: 01282 426331

Changes to this privacy statement

We recognise that transparency is an ongoing responsibility, so we will keep this privacy statement under regular review at least every 2 years.