



GDPR Engagement terms and privacy notice

Paragraphs for Standard terms of business

Data Protection

To enable us to discharge the services agreed in this engagement letter, comply with related legal and regulatory obligations and for other related purposes including updating and enhancing client records and analysis for management purposes, as a data controller, we may obtain, use, process and disclose personal data about [you / your business / company / partnership / its shareholders / members / officers and employees] as described in our privacy notice. We confirm when processing data on your behalf that we will comply with the provisions of all relevant data protection legislation and regulation.

You are also an independent controller responsible for complying with data protection legislation and regulation in respect of the personal data you process and, accordingly where you disclose personal data to us you confirm that such disclosure is fair and lawful and otherwise does not contravene relevant requirements. Nothing within this engagement letter relieves you as a data controller of your own direct responsibilities and liabilities under data protection legislation and regulation.¹

Data protection legislation and regulation places obligations on you as a data controller where we act as a data processor to undertake the processing of personal data on your behalf, for instance where we operate a payroll service for you. We therefore confirm that we will at all times take appropriate measures to comply with relevant requirements when processing data on your behalf. In particular we confirm that we have adequate security

measures in place and that we will comply with any obligations equivalent to those placed on you as a data controller.

Our privacy notice, which can be found on our website at www.dskllp.com as set out in a separate appendix to these terms of business explains how we process personal data in respect of the various services that we provide.

Appendix to Standard Terms – Privacy Notice

Privacy notice for DSK Partners llp

DSK Partners llp takes the protection of your privacy very seriously. We will only use your personal information to deliver the products and services you have requested from us, and to meet our legal responsibilities.

How do we collect information from you?

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

What type of information do we collect from you?

The personal information we collect from you will vary depending on which [products and/or] services you engage us to deliver. The personal information we collect might include your name, address, telephone number, email address, your Unique Tax Reference (UTR) number, your National Insurance number, bank account details, your IP address, which pages you may have visited on our website and when you accessed them.

How is your information used?

In general terms, and depending on which [products and/or] services you engage us to deliver, as part of providing our agreed services we may use your information to:

- ▶ contact you by post, email or telephone
- ▶ verify your identity where this is required
- ▶ understand your needs and how they may be met
- ▶ maintain our records in accordance with applicable legal and regulatory obligations
- ▶ process financial transactions
- ▶ prevent and detect crime, fraud or corruption

We are required by legislation, other regulatory requirements and our insurers to retain your data where we have ceased to act for you. The period of retention required varies with the applicable legislation but is typically five or six years. To ensure compliance with all such requirements it is the policy of the firm to retain all data for a period of six years from the end of the period concerned.

Who has access to your information?

We will not sell or rent your information to third parties.

We will not share your information with third parties for marketing purposes.

Any staff with access to your information have 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 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.

How you can access and update your information

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.

You have the right to ask for a copy of the information [insert firm's name] holds about you.

Security precautions in place to protect the loss, misuse or alteration of 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 offices in the UK. However, to allow us to operate efficient digital processes, we sometimes need to store information in servers located outside the UK, but within the European Economic Area (EEA). 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 choices

We may occasionally contact you by [post / email / telephone] with details of any changes in legal and regulatory requirements or other developments that may be relevant to your affairs and, where applicable, how we may assist you further. If you do not wish to receive such information from us, please let us know by contacting us as indicated under 'Contact information' below.

Your rights

Access to your information: You have the right to request a copy of the personal information about you that we hold.

Correcting your information: We want to make sure that your personal information is accurate, complete and up to date and you may ask

us to correct any personal information about you that you believe does not meet these standards.

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 may 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 consent to use your information’ below].

Restricting how we may 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 may 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.]

[Delete if not applicable as you do not rely on consent] Withdrawing consent to use your information: Where we use your personal

information with your consent 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.dskllp.com.

This privacy notice was last updated on 1 December 2023.

Complaints

We seek to resolve directly all complaints about how we handle your personal information but you also have the right to lodge a complaint with the Information Commissioner’s Office at

Information Commissioner’s Office

Wycliffe House
Water Lane
Wilmslow
Cheshire
SK9 5AF

Telephone: [0303 123 1113](tel:03031231113) (local rate) or [01625 545 745](tel:01625545745)

Website: <https://ico.org.uk/concerns>

Concerns or Queries

For any privacy-related queries or concerns contact:

Dhiraj Shah

DSK Data Protection Officer

Email: dhiraj.shah@dskllp.com



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