

## **Who we are**

This is the privacy statement of MacDonald Morton Ltd (company number SC351892), with our registered office at 67 March Road, Edinburgh, EH4 3SU.

This privacy statement explains how we collect and use personal information about you.

## **What personal information we collect**

We collect data on the following groups who are defined as “data subjects”:

1. MacDonald Morton Ltd’s Clients, Prospective Clients and Former Clients – we will collect and retain information about you in order to provide you with a full range of MacDonald & Morton Ltd’s services.
2. MacDonald Morton Ltd’s Suppliers, Prospective Suppliers and Former Suppliers – We may need to collect data on our suppliers or prospective suppliers with whom we have or are looking to enter into a commercial agreement for provision of services. For example, this includes our legal partners, agencies, contractors and subcontractors.

## **Where we collect personal information from**

### General Data Collection

Under the Applicable Laws, “personal data” is defined as personal information that is connected to or can be identified as being connected to you as an individual (i.e. it can be used to identify you as a data subject). This may include a variety of personal information such as your name, date of birth, contact details including email address, postal address, telephone number, mobile phone number or financial details such as your bank account, your tax details or similar details for the Company for which you work or that you are connected with.

We may collect and store data about you when you:

- Become a client of MacDonald Morton Ltd (after signing a Letter of Engagement that outlines our agreed services provided to you). This can consist of information such as the details above, plus proof of ID in order that we adhere to money laundering legislation, such as a passport and proof of address from a recent utility bill.
- Supply services to MacDonald Morton Ltd. This can consist of information such as terms and conditions of payment of invoices, contact email address, telephone number or mobile phone number.

## **How we use your personal information**

### MacDonald Morton Ltd’s Clients, Prospective Clients and Former Clients

We will use your personal data to contact you. You will normally be issued with a Letter of Engagement (that outlines our agreed services provided to you), personal data retained by us can consist of information such your name, date of birth, contact details including email address, postal address, telephone number, mobile phone number or financial details such as your bank account, your tax details or similar details for the Company for which you work or that you are connected with, plus proof of ID in order that we adhere to money laundering legislation, such as a passport and proof of address from a recent utility bill.

We may also contact you:

- In relation to a service, activity or registration you have signed up for, to ensure that MacDonald Morton Ltd can deliver proactive services to you. We may use your personal data in this respect in order to properly perform under our contract with you.
- In relation to any correspondence we receive from you, or any comment, or a complaint you make about MacDonald Morton Ltd. We may use your personal data as you have requested and consented to our use in order to respond to your comment or complaint.
- In relation to any personalised service you want to receive from MacDonald Morton Ltd. We may use your personal data in this respect in order to properly perform under our contract with you.
- To update you on changes to legislation and regulation that we think would be helpful for you to know about. We may use your personal data in this respect in order to comply with our statutory obligations.

MacDonald Morton Ltd's Suppliers, Prospective Suppliers and Former Suppliers

For any service providers, we process your personal data for proper performance of the supplier contract. We hold data on file for as long as necessary to perform the services required.

### **Further use of your data**

We use your data for to communicate with you for business, regulatory and legal purposes, or in relation to completing tasks such as tax returns. We will also retain your data to get in touch with you about regulation and legislation that may affect you currently or in the future. We aim to personalise the information we share according to the things you have told us that you want to know about. We may use your personal data in this respect in order to comply with our statutory obligations and are legally obliged to keep information about your relationship with us for up to 7 years. If you decide to move to a new accountancy firm, your records will be shared with this new supplier in order that they can provide a service to you. We do not knowingly have any advertising from third party sites on our website.

We will never ask you for your password or other log in details to any cloud based services we provide you. Please be cautious if you receive emails or calls from people asking for this information that claim to be from MacDonald Morton Ltd. If you suspect any suspicious behaviour, please get in touch with your usual contact at MacDonald Morton Ltd.

### **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** – If you would like us not to contact you in future (outside the scope of the Letter of Engagement), this option is always available to you. As outlined above, MacDonald Morton Ltd is legally obliged to retain any information on the services we have provided to you for 7 years.

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.
- We are using that information with your consent and you have withdrawn your consent – see *Withdrawing consent to using your information* below.
- 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.

**Objecting to how we may use your information** – You have the right at any time to require us to stop using your personal information for direct marketing purposes. In addition, 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.

**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 this is no longer a basis for using your personal information but you don't want us to delete the data. Where this right to 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.

**Automated processing** – If we use your personal information on an automated basis to make decisions which significantly affect you, you have the right to ask that the decision be reviewed by an individual to whom you may make representations and contest the decision. This right only applies where we use your information with your consent or as part of a contractual relationship with you.

**Withdrawing consent using 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 the *Contact information and further advice* section if you wish to exercise any of these rights.

### **Changes to our privacy statement**

We keep this privacy statement under regular review and will place any updates on this website. Paper copies of the privacy statement may also be obtained by writing to MacDonald Morton Ltd at 67 March Road, Edinburgh, EH4 3SU.

This privacy statement was last updated on 22 May 2018.

### **Contact information and further advice**

Data Protection Officer: Douglas Morton, Director, MacDonald Morton Ltd, 67 March Road, Edinburgh, EH4 3SU or email [douglas@mmca.co.uk](mailto:douglas@mmca.co.uk)

### **Complaints**

We seek to resolve directly all complaints about how we handle personal information but you also have the right to lodge a complaint with the Information Commissioner's Office, whose contact details are as follows:

Information Commissioner's Office  
Wycliffe House  
Water Lane  
Wilmslow  
Cheshire  
SK9 5AF

Telephone - 0303 123 1113 (local rate) or 01625 545 745

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