



Privacy Notice

The new data protection law as of May 25th 2018, General Data Protection Regulations (GDPR) makes some changes to your rights and what information we need to give you. Please have a read through to find out how we will use your data. We will explain this in plain English as much as possible.

Who is collecting and using your personal data?

Eric Dunmore T/A EMD Solutions is the data controller. You can contact us:

- Via email: eric@emdsolutions.co.uk

What data do we need to process?

This depends on the purpose of the processing, please see below for purposes that may be relevant to you

To provide you with information that you have requested

Legal basis – Legitimate Interest

Personal data types

- First and last name
- Job title
- Email address
- Phone number
- Address

Retention period – 2 years, or if we have an ongoing business relationship, for the duration of that or any other ongoing relationship we have, whichever it the higher.

If we hold your data as a business contact, we do so in order to reach out to you if we become aware of some business that we think you may be interested in

Legal basis – Legitimate Interest

Personal data types

- First and last name
- Job title
- Email address

- Phone number
- Address

Retention period – 20 years as the nature of our business means that we may not be in touch with you for long periods. We will contact you at least annually to make sure that your information is up to date. You can also help us with this, by informing us of any changes.

When we are providing consultancy services to you

n.b. As this may involve being part of a sale or purchase there may be, on occasion data types required for the execution of our duties that are not listed here, but should we need to collect them we will make sure that you are made aware at the time that the data is collected.

Legal basis – Contractual Necessity

Personal Data Types

- First name and last name
- Company name
- Job title
- Email address
- Phone number
- Address
- Financial history of our transactions
- Employment history
- Age
- Gender
- Financial information
- HR information

Retention period – 7 years

When we are acting as a trustee

n.b. As this is a very broad, dynamic position there may be, on occasion data types required for the execution of our duties that are not listed here, but should we need to collect them we will make sure that you are made aware at the time that the data is collected.

Legal basis – Compliance with legal obligations

Personal Data Types

- First name and last name
- Company name
- Job title
- Email address
- Phone number
- Address
- Financial history of our transactions
- Employment history
- Age

- Gender
- Financial information
- HR information
- Wills
- Next of kin contact information

Also, on occasion where directly relevant and necessary, with your explicit consent

- Physical health
- Mental health

Retention period – This will vary due to the wide-ranging processes. Please refer to the retention schedule for more detail

Relating to billing

Legal basis – Contractual Obligation

Personal Data Types

- First name and last name
- Company name
- Email address
- Address
- Financial history of our transactions

Retention period – 8 years

When you leave us a voicemail

Legal basis – Contractual Obligation

Personal Data Types

- First Name and Last Name
- Email address
- Phone number
- Company name
- Anything you tell us in the message which can include passwords

Retention period – 12 months or for the duration of any contract between us.

We may also process data to protect vital interests, i.e. relating to saving someone's life

When we process on the lawful basis of legitimate interest, we apply the following test to determine whether it is appropriate:

The purpose test – is there a legitimate interest behind the processing?

Necessity test – is the processing necessary for that purpose?

Balancing test – is the legitimate interest overridden, or not, by the individual’s interests, rights or freedoms?

How is my personal data being used?

Your personal data will be processed on a need to know, confidential basis by members of the team. It may also be processed by third parties such as cloud backup providers, website hosting companies, IT managed service providers, privacy consultants, accountants, statutory bodies and similar as required. Everyone with access to your data will treat it confidentially and in a GDPR compliant fashion.

We may also disclose your personal information to third parties:

- In the event that we sell or buy any business or assets, in which case we will disclose your personal data to the prospective seller or buyer of such business or assets; or
- If we are under a duty to disclose or share your personal data in order to comply with any legal obligation, or to protect our rights, property, or safety, or that of our clients, or others. This includes exchanging information with other companies and organisations for the purposes of fraud protection and credit risk reduction.

We only process data that is necessary for our purpose and we only keep it for as long as we have to.

The Regulations are particular about where data is processed and some internet and other services work through contracts with overseas companies. We will not transfer your data to ‘Third Countries’ however some of our processors may do and where this is the case we have ensured that they are using GDPR recognised means of doing this such as Binding Corporate Rules or the EU-US or Switzerland – US Privacy Shield. If you would like to view the documentation relating to any such transfers we will be happy to provide you with it.

Our security measures include device encryption, email encryption, regular encrypted backups, two factor authentication, state of the art malware (anti-virus) endpoint protection, computer monitoring, update management, staff training and intruder alarms.

Will you sell my data or use it for marketing?

No, other than to contact you should we discover an opportunity we think you may be interested in.

What are my rights?

The GDPR gives you several rights such as the right to:

- ask to see what data we process for you – this is called a subject access request (SAR)
- withdraw consent given to processing of your personal data
- ask us to rectify inaccuracies – and we ask that you keep us up to date with any changes to your contact details
- request erasure of your personal data
- object to us processing your personal data
- request restriction to processing data concerning you (normally this would be while we look at an objection to us processing your data. There are other situations where this applies too, get in touch if you need more info)

- portability of your data – In some cases you can request your data in a form that makes it easy to take to another processor.
- lodge a complaint with a Supervisory Authority (within the UK this would normally be the Information Commissioner’s Office – <http://www.ico.gov.uk>)

Do I have to give you my data?

No, apart from where there is a statutory or contractual requirement for you to give us your data you are under no obligation to share your data with us.

If you don’t share your data with us we may have difficulty providing some elements of our service. This is not practical or helpful to expand on this here, but we will discuss it with you should the situation arise.

Do you use automated decision-making or profiling?

No

If you are still with us....

Hopefully we have made this as open and transparent as possible.

All that you really need to know, other than your rights under GDPR, is that we will be doing exactly what we have been doing for you up until this point, but there may be small changes in the background to protect your data further.

If you have any questions about how your data is handled just ask, we will be happy to explain.

Document version:	3.0
Document issued:	13/06/2018