

# Ward Goodman - Privacy Notice

References to Ward Goodman in this privacy notice include the following Data Controllers: Ward Goodman Ltd, Ward Goodman Accountancy Services Ltd, Ward Goodman Audit Services Ltd, Ward Goodman Financial Services Ltd, HK Financial Advice Service Ltd and Blanchards Bailey Financial Services Ltd.

This Privacy Notice provides details of the personal data we collect from you, what we do with it, how you might access it and who it might be shared with.

## Our Contact Information

### Ward Goodman

4 Cedar Park, Cobham Road  
Ferndown Industrial Estate  
Wimborne  
Dorset  
BH21 7SF

Telephone: 01202 875900  
Email: [data.protection@wardgoodman.co.uk](mailto:data.protection@wardgoodman.co.uk)

## What personal data do we collect?

The personal data we collect depends on whether you just visit our website or use our services. If you visit our website, you do not need to provide us with any personal data. However, your browser transmits some data automatically, such as the date and time of retrieval of one of our web pages, your browser type and settings, your operating system, the last web page you visited, the data transmitted and the access status, and your IP address.

If you use our services, personal data is required to fulfil the requirements of a contractual or service relationship, which may exist between you and Ward Goodman.

We collect data in respect of the following;

- Credit History
- Digital Images
- Employment History
- Family
- Financial Details
- Identification Number
- Photographs together with Identifiers
- Visual Images
- Email, Social Networks
- Location Information
- Name
- Telephone contact details
- Banking Details
- Confidential Correspondence
- Online Identifiers

We collect sensitive personal data only with explicit consent of the data subject for the purposes of providing specific services, eg life and critical illness quotations/ recommendations, in respect of the following:

- Health
- Racial or Ethnic Origin



## What we do with your personal data

We process personal data only for the purpose for which they are collected. The purpose is dependent on whether you use only our website, or additionally, our services. If you use our services you are required to engage in a contract for our services before we collect your personal data. We use this personal data for the provision of the service or the performance of the contract. We may use your personal data for other similar purposes, including marketing and communications, but that will only occur if we have your consent or another legal justification for doing so.

From our clients we process and retain personal data for the following purposes and periods, with the applicable legal basis.

Processing purpose	Legal basis	Retention period
Identity verification, business operations and due diligence, fraud detection and prevention, legal and regulatory compliance	We have to comply with a legal obligation	Until tax or other retention period expires
Service delivery	We have a contract with the data subject	Until tax or other retention period expires
Communications and marketing	It's in our legitimate interest	Until consent withdrawn
Payment card processing	We have the data subject's consent	Destroyed once processed

From our prospective clients we process and retain personal data for the following purposes and periods, with the applicable legal basis.

Processing purpose	Legal basis	Retention period
Communications and marketing	It's in our legitimate interest	Until consent withdrawn

From our service providers we process and retain personal data for the following purposes and periods, with the applicable legal basis.

Processing purpose	Legal basis	Retention period
Service delivery	We have a contract with the data subject	Until tax or other retention period expires

From our visitors to our offices we may process and retain personal data for the following purposes and periods, with the applicable legal basis.

Processing purpose	Legal basis	Retention period
Site management and security	We have the data subject's consent	1 year



From our suppliers we process and retain personal data for the following purposes and periods, with the applicable legal basis.

Processing purpose	Legal basis	Retention period
Business operations and due diligence	We have a contract with the data subject	Until tax or other retention period expires

From our event attendees we may process and retain personal data for the following purposes and periods, with the applicable legal basis.

Processing purpose	Legal basis	Retention period
Communications and marketing, service delivery, events management	We have the data subject's consent	Until consent withdrawn

## Who might we share your personal data with?

To maintain and improve our services, your personal data may need to be shared with or disclosed to service providers, other controllers or, in some cases, public authorities. We may be mandated to disclose your personal data in response to requests from a court, police services or other regulatory bodies. Where feasible, we will consult with you prior to making such disclosure and, in order to protect your privacy, we will ensure that we will disclose only the minimum amount of your information necessary for the required purpose.

We transfer personal data to the following organisations and countries:

Data subject type	Organisation name	Organisation type	Country
Clients, employees and suppliers	HM Revenue & Customs, Companies House, regulators and other authorities	Data Controller	United Kingdom
Clients	Any organisation for which you give your permission	Data Controller/ Processor	United Kingdom
Clients and employees	Subcontractors and other persons who help us provide our products and services or provide services to us	Data Controller/ Processor	United Kingdom



## Automated Decision Making

Ward Goodman does not use computers to automatically make decisions which may have an effect on you.

## How do we look after personal data?

We limit the amount of personal data collected only to what is fit for the purpose, as described above. We restrict, secure and control all of our information assets against unauthorised access, damage, loss or destruction; whether physical or electronic. We retain personal data only for as long as is described above, to respond to your requests, or longer if required by law and/or establishment and defence of legal rights. Where we retain your personal data for historical or statistical purposes we ensure that the personal data cannot be used further. While in our possession, together with your assistance, we try to maintain the accuracy of your personal data.

## How can you access your personal data?

You have the right to request access to any of your personal data we may hold. If any of that information is incorrect, you may request that we correct it. If we are improperly using your information, you may request that we stop using it or even delete it completely.

If you would like to make a request to see what personal data of yours we hold, you may make a request through our company website.

Where you have previously given your consent to process your personal data, you also have the right to request that we port or transfer your personal data to a different service provider or to yourself, if you so wish.

Where it may have been necessary to get your consent to use your personal data, you have the right to withdraw that consent. If you withdraw your consent, we will cease using your personal data without affecting the lawfulness of processing based on consent before your withdrawal.

## Our Supervisory Authority

You have the right to lodge a complaint with any Supervisory Authority. Our Supervisory Authority contact details below

ICO  
Wycliffe House  
Water Lane  
Wilmslow  
Cheshire  
SK9 5AF

01625 545 745  
[www.ico.org.uk](http://www.ico.org.uk)