

# O'Hanlon Tax Limited - Privacy Policy

O'Hanlon Tax Limited ("OHT") may gather private personal data in the course of our services to clients. The firm is committed to ensuring that clients' privacy is protected and this statement (read in conjunction with our Terms of Engagement) sets out our practice in relation to the collection, storage and use of personal data relating to clients and other parties.

## OHT's Receipt of Personal Data

OHT will collect and process personal data. We may require you to provide personal information in meetings or by phone, e-mail or otherwise to enable the firm to provide tax and business advice. The information sought may include (but is not limited to) name and address, e-mail address, phone number, PPS number, financial and credit card information, bills, passport, driving licence or other identification documents, tax and financial records, medical records, etc.

You are not obliged to provide personal information but you should bear in mind that if data is not provided, it may impede OHT in providing the services that have been requested. We may also collect information from other sources such as other advisors, business partners, the internet, public registers, and government or regulatory authorities.

It is your responsibility to ensure that all Personal Data you provide us with are complete, accurate and up-to-date in all respects and not misleading. Our ability to provide our advice and services, and the quality thereof, may be negatively affected if you fail to do so.

You may provide Personal Data about yourself or about other people to us during the course of our dealings with you. Whenever you provide us with Personal Data about another person, you must ensure that you are entitled to disclose the Personal Data relating to that other person to us and that we may process that Personal Data in accordance with this Privacy Statement without having to take any further steps. It is your responsibility to ensure that any other person concerned is aware of the content of this document.

## OHT's Use of Personal Data

OHT gathers and uses information to enable the

firm to:-

- Comply with legal provisions such as anti-money laundering obligations,
- Provide the tax and business services requested from us,
- Provide information about services we offer and tax updates, and
- Review and improve the services we provide.

Where data are submitted, it is intended to be held for the stated purpose and incidental uses, and it is not intended to be used for any other purpose. OHT will not sell or distribute your personal information to third parties for the purposes of allowing them to market products and services to you.

By providing data you are consenting to the processing of your personal data for the purposes of our business and we may use the data to provide you with information on our services.

## Sharing Data

Data held by OHT may be accessible to agents and contractors in connection with the services that they provide to OHT (such as the maintenance of our accounts, database, website or computer system). Any such agents or contractors of OHT have access to OHT data solely for the purpose of providing services to OHT, and we request any such agent or contractor to observe the OHT commitments on security and privacy obligations.

OHT reserves the right to disclose your data in the context of the purchase or sale of a business or assets, or in the course of complying with any legal or regulatory obligation on OHT, or in order to enforce or apply our Terms of Engagement.

## Data Retention

OHT aims to hold personal data for as long as is required to provide services to our clients, and not to retain it longer than is reasonably necessary. In general, data will be stored in hard copy or in an electronic format for a period of no less than six years beginning on the date that the file is archived by OHT.

We will 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 legal requirements.

### **OHT Storage of Data**

Physical files that are still in active use are stored in OHT's office. We reserve the right to store archived physical files offsite and before transferring physical files offsite for storage OHT confirms with the service provider that appropriate safeguards are in place.

Electronic files are stored on our servers and we reserve the right to store electronic data on external servers or in the cloud. Data held in the cloud may be stored outside the European Economic Area, but before data is transferred for storage on the cloud we will confirm with the service provider that appropriate safeguards are in place.

### **Communicating Electronically**

Communicating electronically via the internet involves personal information passing through third parties. OHT endeavours to ensure that your personal data are protected but we cannot guarantee the security of data transmitted electronically and it should be noted that any such transmission is made to and from you at your risk.

We may contact you by email with updates on tax and business issues, or on the services provided by OHT. An option to unsubscribe from our marketing list is included on any such email that we send, and can be availed of if you do not want to receive further emails from OHT.

### **Data Protection Rights**

You have the following rights:

- A right to object to direct marketing
- A right to restrict the processing of information, including automated decision-making
- A right to data portability
- A right to a copy of any personal data OHT holds relating to you
- A right to rectify any inaccurate data that may be held without undue delay
- A right to erase your personal data
- A right to lodge a complaint with the Data Protection Commissioner if you feel that your

personal data is not being dealt with correctly or not available to you

OHT notes that a client may withdraw consent to the processing of personal data any time. This will not affect the lawfulness of any actions taken by OHT before the withdrawal of consent is communicated to the firm. OHT reserves the right to retain data to the extent required to meet its legal and regulatory obligations, and also to the extent reasonably required to protect its commercial interest and facilitate the collection of any unpaid fees due to the firm. If you would like to contact OHT in relation to your personal data please e-mail [privacy@ohanlontax.ie](mailto:privacy@ohanlontax.ie).

### **Governing Law & Enforceability**

This Privacy Policy and any issues relating to OHT's website are governed exclusively by Irish law and are subject to the exclusive jurisdiction of the Irish courts.

If any part of OHT's Privacy Policy is held to be invalid or unenforceable, the validity or enforceability of the remainder will not be affected. Delay or failure on OHT's part in enforcing any of our rights shall not constitute a waiver by the firm of its rights and remedies.

### **Changes to Privacy Policy**

We reserve the right to modify the firm's Privacy Policy at any time, and any revised Privacy Policy will be published on the OHT website. By using OHT's website, you signify your express acceptance of the firm's Privacy Policy.

Statistical information may become available to OHT via our internet service provider if you are web-browsing and you should note that we may use cookies and other similar technologies, such as pixels and tags, on our website ([www.ohanlontax.ie](http://www.ohanlontax.ie)) to improve the efficacy of operation and any online services that we provide.

Each time you use OHT's website or services you are bound by the then current Privacy Statement and we would recommend that you review the current Privacy Statement available on the OHT website each time you use the firm's services or website.

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