

## Privacy Policy

This policy describes how David J Stewart Associates use and protect your personal data and other information. It also explains how and why we collect, store, use and share this data.

We will ensure that your privacy is protected. If we ask you to provide information by which you can be identified, then it will only be used in conformity with this policy.

### What we collect

We collect only minimal information. We may hold the following information in our records:

- Your name
- Your employer or company (if appropriate), your job title and your responsibilities
- Your address and telephone numbers
- Electronic contact details
- Other information that is necessary for the conduct of our professional services.

### How and why we use your personal data

David J Stewart Associates are the data controller and are responsible for ensuring that its officers, and through them its systems and processes, comply with data protection legislation. We collect almost all of this information from you directly. However, we may also collect information from publicly accessible sources, all in connection with a professional appointment.

We will only use your information in ways that you would reasonably expect, including for the following reasons:

- to understand your requirements and provide you with our professional services
- Internal record keeping
- For the performance of an agreement with you or to take steps at your request (either directly or indirectly through a third party) to prepare for a contractual agreement
- Accountancy and other legal obligations
- For conflict of interest checks and other legitimate interests.

### Who we share your personal data with

We routinely share personal data with:

- Other people or companies that you appoint in connection with our duties to you
- Other third parties where necessary to carry out your instructions
- Our insurers
- Our bank

## Security

We take reasonable steps to ensure that your information is secure. In order to prevent unauthorised access or disclosure we have procedures and processes that are designed to safeguard and secure the information we collect.

## Controlling your personal information

Please write to us if you wish us to do any of the following, which we shall do promptly:

- restrict the collection or use of your personal information at any time;
- delete your personal information;
- send you a copy of the personal information of yours that we hold;
- correct any information of yours that contains errors.

We will not sell, lease or give your personal information to third parties unless we have your permission or are required by law to do so. We will not use your personal information to send you promotional information about third parties unless you ask for it.