

## Virtual PA Solutions Limited t/a Virtual PA Services Privacy and Cookies Notice

– Updated September 2019

### 1. Definitions

- 1.1 **“The Company”** means Virtual PA Solutions Limited t/a Virtual PA Services. Also referred to in this Privacy notice as **“us” or “we” or “our”**.
- 1.2 **“Data Protection Legislation”**: means any laws and regulations in any relevant jurisdiction relating to privacy or the use or processing of data relating to natural persons, including: (a) EU Directives 95/46/EC and 2002/58/EC (as amended by 2009/139/EC) and any legislation implementing or made pursuant to such directives, including (in the UK) the Privacy and Electronic Communications (EC Directive) Regulations 2003; and (b) EU Regulation 2016/679 (**GDPR**); the **Data Protection Act 2018 (DPA 2018)** (c) and (d) any laws or regulations ratifying, implementing, adopting, supplementing or replacing GDPR; and (e) any guidance or codes of practice issued by a DP Regulator; in each case, to the extent in force, and as such are updated, amended or replaced from time to time.
- 1.3 **“DP Regulator”** means any governmental or regulatory body or authority with responsibility for monitoring or enforcing compliance with the Data Protection Laws;
- 1.4 **“Data Controller”** and **“Data Processor”** have the meaning given to the term "controller" and "processor" (respectively) in Article 4 of GDPR;
- 1.5 **“Personal Data”** is any data which enables us to identify you, either directly or indirectly, such as your name, address, telephone number, email address or the IP address of your computer. We refer to this information throughout this Privacy Notice as **“Personal Data”** and clause 4 sets out further detail of what this includes.
- 1.6 This Privacy Notice relates to personal information that identifies **“you”** where you are a customer or potential customer, an individual who browses our website or an individual outside our organisation with whom we interact. **If you are an employee, supplier, customer, client or otherwise engaged in work for us or applying to work for us, an additional privacy notice or data processing agreement applies to you and will be supplied to you.**
- 1.7 **“Services”** means the paraplanning (PA) and administrative support services including financial PA services, business PA services, lifestyle PA services any other related Services as described through <https://www.vpaservices.net/>

### 2. Introduction

- 2.1 This Notice sets out how we collect and process your Personal Data and also provides certain information that is legally required and lists your rights in relation to your Personal Data.
- 2.2 The Company is committed to respecting the privacy of every client, visitor to the website <https://www.vpaservices.net/> and every person using the enquiry forms on our website:
- 2.2.1 “send us your enquiry” form - <https://www.vpaservices.net/contact-us>

- 2.2.2 financial services PA sign up form – <https://www.vpaservices.net/forms/financial-pa-form>
- 2.2.3 business PA sign up form - <https://www.vpaservices.net/forms/business-pa-form>
- 2.3 The information we collect about you will be used to fulfil the required Services and enable us to improve how we communicate with you. By providing us with your data, you warrant to us that you are over 13 years of age.
- 2.4 We reserve the right to update this Notice and the most current notice is displayed at <https://www.vpaservices.net/privacy-policy>

### **3. Data Controller and Contact Details**

- 3.1 For the purposes of Data Protection Legislation, The Company is a controller and a processor of your Personal Data, and as a controller we use the Personal Data we hold about you in accordance with this Privacy Notice.
- 3.2 Should you have a question about the data we store, our contact details are:

Full name of Company entity: Virtual PA Solutions Limited t/a Virtual PA Services  
Registered Company number: 07505610  
Named person responsible for data protection: Ms. M York, Managing Director  
Email address: [melanie.york@vpaservices.net](mailto:melanie.york@vpaservices.net)  
Website Address: <https://www.vpaservices.net/>  
Registered office address: Virtual PA Services, 884 The Crescent, Colchester Business Park, CO4 9YQ

### **4. Categories and types of data and where we collect it from**

- 4.1. when you make an enquiry with us via our website or via email, or call us:
  - 4.1.1 personal and contact details; business contact information, industry type and activities of the person whose personal information is being processed; family details including those of children aged 13 and over; lifestyle and social circumstances, including details of memberships and insurance details; goods and services and preferences; birth date; financial information (including bank details) and income statements; compensation information (including salary, bonus and pension contributions); education and employment information; preferences and interests.
  - 4.1.2 Personal Data of your organisation and it's employees, directors, or agents such as the business name, director and partner names and contact details, business address, business email address.
  - 4.1.3 Personal Data gathered using cookies; see here for more information on what information we collect and how we use cookies. For more information on cookies please see clause 12.
  - 4.1.4 details of your visits to our website including but not limited to traffic data, location data, weblogs and other communication data.

4.2 in relation to the Services we provide:

- 4.2.1. Personal Data that you provide in the course of instructing us to carry out the Services requested from us, such as your name, address, telephone number and email details; personal and contact details; business activities of the person whose personal information is being processed; details of personal memberships and insurances; income information; family details; lifestyle and social circumstances; goods and services; birth date; financial information (including bank details); compensation information (including salary, bonus and pension contributions); education and employment information; preferences and interests.
- 4.2.2 Personal Data that, in the case of a business relationship, your employer provides about you in the course of instructing us to carry out the Services requested from us, such as your name and contact details as a representative of the business;
- 4.2.3 Financial information, such as your name and financial position, from credit reference agencies and your bank details;
- 4.2.4 Personal Data from tracing agents in the event you fail to pay any invoice by the due date, and we are unable to locate you using the contact details you have provided us with;
- 4.2.6 Personal Data you provide if you complete a customer care surveys from us.

4.3 in order to develop, personalise or promote our products and Services:

- 4.3.1 Personal Data obtained directly from you, such as your name and contact details and preferences relating to particular Services, industries and / or products;
  - 4.3.2 Personal Data you provide such as your name and email address, if you enter into a competition, promotion or prize draw;
  - 4.3.3 Personal Data gathered using cookies; for more information on what information we collect and how we use cookies please see clause 12.
  - 4.3.4 details of your visits to our websites including but not limited to traffic data, location data, weblogs and other communication data.
- 4.4 We may also record Personal Data about you if you, for example, contact us by telephone to make a complaint about our Services, then we may make a written record of key details of the conversation so that we can take steps to address the complaint. This may include obtaining data concerning health. Data concerning health is considered a “Special Category of Data” and this Privacy Notice specifically sets out how we may process these types of Personal Data in clause 6.

## 5. Where we rely on consent

- 5.1 We may collect your personal data on the basis of consent when you visit our website, opt-in to marketing, and for business operation and relationship management purposes when you or your organisation:
- a) enquire about engaging us for Services;
  - b) communicate with the Company director's or employees;
  - c) visit our premises;
  - d) work with us or supply us with services, or offer to;
  - e) when you supply your personal data to us via our website, email, in person, by telephone or otherwise;
  - f) when you subscribe to any of our newsletters or mailing lists, and
  - g) For marketing, business operation and relationship management purposes, we will collect and process personal data including:
    - your name;
    - your employer, your job title and/or position;
    - your contact details, including your address, email address and phone number;
    - information relating to your subscription to, receipt of or interest in any of our mailing lists, newsletters or events.
- 5.2 For some of these purposes it may be appropriate for us to obtain your specific consent. These circumstances are as follows:
- a) where, in the handling of a complaint, we collect Special Categories of Data relating to health;
  - b) where we would like to use photos or images taken of you in promotional materials.
- 5.3 The legal basis of consent is only used by us in relation to processing that is entirely voluntary – it is not used for processing that is necessary or obligatory in any way.
- 5.4 You may at any time withdraw the specific consent you give to process your Personal Data where we are relying on your consent. Please contact us using the contact details set out in clause 3.2. Please note even if you withdraw consent for us to use your Personal Data for a particular purpose, we may continue to rely on other bases to process your Personal Data for other purposes. We will tell you if this is the case.
- 5.5 Under the Privacy and Electronic Communications Regulations (PECR), we may send you marketing communications from us if (i) you made a purchase or asked for information from us about our goods or Services or (ii) you agreed to receive marketing communications and in each case you have not opted out of receiving such communications since. However, you can still opt out of receiving marketing emails from us at any time by emailing us at [melanie.york@vpaservices.net](mailto:melanie.york@vpaservices.net)

## 6. Where we are relying on a basis other than consent

- 6.1 We will only process your Personal Data using one of more of the following lawful bases permitted under Data Protection Legislation. The table below sets out the linked purposes for which such Personal Data is processed:

| Purposes for which we process your Personal Data  | The basis on which we can do this under Data Protection Legislation  |
|---|--|
| In order to perform our contractual obligations to you. This would include our fulfilling orders you have placed for goods or services.   | The processing is necessary in connection with any <b>contract</b> that you may enter into with us.  |
| In order to comply with our own legal obligations, e.g. health and safety or tax legislation.   | The processing is necessary for us to <b>comply with the law</b> .   |
| In order to use your Personal Data in life or death situations and there is no time to gain your consent (e.g. in the event of an accident and we have to give your personal details to medical personnel).   | The processing is necessary in order to protect the <b>vital interests</b> of an individual.   |
| <p>In order to operate our business, but otherwise than in performing our contractual obligations to you, for example:</p> <ul style="list-style-type: none"> <li>• to send you important notices such as communications about changes to our terms and conditions and policies;</li> <li>• to deal with any misuse of our website;</li> <li>• to provide you with important real-time information about products or services you have ordered from us (e.g. a change of time or location due to unforeseen circumstances);</li> <li>• to send you information you have requested;</li> <li>• to deal with your enquiries;</li> <li>• to develop, deliver and improve our goods or Services;</li> <li>• to help us develop our website to be more useful to you;</li> <li>• for internal purposes for research, analysis, testing, monitoring, customer communication, risk management and administrative purposes;</li> <li>• for direct marketing;</li> <li>• for data analytics;</li> <li>• for identifying usage trends;</li> <li>• for determining the effectiveness of promotional campaigns and advertising;</li> <li>• to protect and defend our rights or our property;</li> <li>• to sell, make ready for sale or dispose of our business in whole or in part including to any potential buyer or their advisers; or</li> <li>• in order to enforce or apply our terms of use, terms and conditions of supply and other agreements with third parties.</li> </ul> | <p>We have a <b>legitimate interest</b> in carrying out the processing, which is not overridden by your interests, fundamental rights or freedoms.</p> <p>This includes our legitimate interest in:</p> <ul style="list-style-type: none"> <li>• the effective and efficient management and operation of our business;</li> <li>• the development, extension and promotion of our business;</li> <li>• the protection of our business;</li> <li>• the security of our systems and data;</li> <li>• the provision of quality goods and services to our customers;</li> <li>• making sure our marketing is relevant to you;</li> <li>• supporting and training our employees in order to provide quality services to you.</li> </ul> |

6.2 In addition, in a limited number of circumstances we may lawfully process Special Categories of Personal Data in certain ways. We set these out below along with the legal bases on which we process these Special Categories of Personal Data:

| Purposes for which we process your Personal Data  | The bases on which we can do this (this is what the law allows)  |   |
|---|--|---|
| <p>In order for us to respond to any claim or potential claim by you involving personal injury or a health issue.</p> | <p>We have a legitimate interest in carrying out the processing, which is not overridden by your interests, fundamental rights or freedoms. Our legitimate interest is:</p> <ul style="list-style-type: none"> <li>• in the management and operation of our business; and</li> <li>• the protection of our business; and</li> <li>• the provision of quality goods and services to our customers.</li> </ul> | <p>The processing is necessary to <b>protect your vital interests, for the establishment, exercise or defence of legal claims</b> or whenever courts are acting in their judicial capacity.</p> |

## 7. Who receives your Personal Data?

7.1 We may disclose your Personal Data to:

- 7.1.1 Third party data processors, such as Google and marketing and website developers, to enable us to carry out or improve our usual business practices. We have contracts in place with our data processors, which means that they cannot do anything with your personal information unless we have instructed them to do it and they must hold your data securely and retain it only for the period we instruct;
- 7.1.2 legal and regulatory authorities who request your Personal Data or to report any potential or actual breach of applicable law or regulation;
- 7.1.3 external professional advisers such as accountants, auditors and lawyers, provided that they are under duties of confidentiality;
- 7.1.4 law enforcement agencies, courts or other relevant party, to the extent necessary for the establishment, exercise or defence of legal rights;
- 7.1.5 third parties where necessary for the purposes of prevention, investigation, detection or prosecution of criminal offences or the execution of criminal penalties;
- 7.1.6 third parties which are considering or have decided to buy some or all of our assets (including in the event of a reorganisation, or sale of The Company); and

- 7.1.7 third party data controllers operating plugins or content (such as Facebook, Twitter, and Instagram) on our website or providing services which you choose to interact with. In relation to these products and services you should familiarise yourself with the privacy notice of the relevant data controller for information about the scope of their data processing and implementation of your rights.
- 7.2 Personal Data we collect from will not be transferred, stored and/or processed outside the European Economic Area.
- 7.3 We will store your Personal Data for the time period which is appropriate in accordance with our data retention policy. The length of time set out in our retention policy is determined by one or more of the following criteria:
  - 7.3.1 we are required to retain your Personal Data in order to comply with any legal requirements, such as under tax law;
  - 7.3.2 where retention of your Personal Data is necessary to facilitate and support the original purpose for processing your Personal Data;
  - 7.3.3 protection against any potential claims arising from the original purpose of processing; or
  - 7.3.4 where we rely upon your consent to process your Personal Data and you continue to consent to the processing.
- 7.4 If you would like details about how long we hold your data, please contact us using the contact details set out in clause 3.2
- 7.5 We keep the length of time that we hold your Personal Data for under review. These reviews take place annually.

## **8. Contractual or statutory requirements for you to provide Personal Data**

- 8.1 In certain circumstances the provision of Personal Data by you is a requirement:
  - 8.1.1 to comply with the law or a contract; or
  - 8.1.2 necessary to enter into a contract.
- 8.2 It is your choice as to whether you provide us with your Personal Data necessary to enter into a contract or as part of a contractual requirement. If, however you do not provide your Personal Data then we may be unable to perform all or some of the Services you expect under our contract with you. An example of this would be where we are unable to provide you with certain products or Services as we do not have your full details, or where we cannot perform our contract with you because we rely on the Personal Data you provide in order to do so.
- 8.3 Subject to applicable law including relevant Data Protection Legislation, in addition to your ability to withdraw any consent you have given to our processing your Personal Data you may have a number of rights in connection with the processing of your Personal Data, including:
  - 8.3.1 the right to request access to your Personal Data that we process or control;

- 8.3.2 the right to request rectification of any inaccuracies in your Personal Data or, taking into account the purposes of our processing, to request that incomplete data is completed;
  - 8.3.3 the right to request, on legitimate grounds as specified in law:
    - (a) erasure of your Personal Data that we process or control; or
    - (b) restriction of processing of your Personal Data that we process or control;
  - 8.3.4 the right to object, on legitimate grounds as specified in law, to the processing of your Personal Data;
  - 8.3.5 the right to receive your Personal Data in a structured, commonly used and machine-readable format and to have your Personal Data transferred to another controller, to the extent applicable in law; and
  - 8.3.6 the right to lodge complaints regarding the processing of your Personal Data with the Information Commissioner's Office or other relevant supervisory body. Please see <https://ico.org.uk/make-a-complaint/> for how to do this.
- 8.4 If you would like to exercise any of the rights set out above, please contact us using the contact details set out in clause 3.2

## **9. Personal Data which you provide to the Company**

- 9.1 It is your responsibility to ensure that all Personal Data you provide us with is 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. Please let us know if at any time your personal information changes by emailing us at: [melanie.york@vpaservices.net](mailto:melanie.york@vpaservices.net)
- 9.2 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 and/or their associated organisation and that we may process that Personal Data in accordance with this Privacy Policy without having to take any further steps. It is your responsibility to ensure that the person concerned is aware of the content of this Privacy Policy.
- 9.3 We expect the information we hold to be accurate and up to date. You have the right as an individual to find out what information we hold about you and make changes if necessary; you also have the right, assuming we are not obligated by law to refuse, to ask us to stop using the information. To have your information removed or rectified, please contact [melanie.york@vpaservices.net](mailto:melanie.york@vpaservices.net)
- 9.4 We will only use your Personal Data for a purpose it was collected for. For more information on this please email us at [melanie.york@vpaservices.net](mailto:melanie.york@vpaservices.net) If we need to use your details for an unrelated new purpose, we will let you know and explain the legal grounds for processing.
- 9.5

## 10. Third Party Links

- 10.1 This website <https://www.vpaservices.net/> may include links to third-party websites, plugins and applications. Clicking on those links or enabling those connections may allow third parties to collect or share data about you. We do not control these third-party websites and are not responsible for their privacy statements. When you leave our website, we encourage you to read the privacy notice of every website you visit.

## 11. Embedded content from other websites

- 11.1 Articles on this site may include embedded content (e.g. videos, images, articles, etc.). Embedded content from other websites behaves in the exact same way as if the visitor has visited the other website. These websites may collect data about you, use cookies, embed additional third-party tracking, and monitor your interaction with that embedded content, including tracing your interaction with the embedded content if you have an account and are logged in to that website.

## 12. Cookies

- 12.1 The website <https://www.vpaservices.net/> uses essential performance cookies. These are small text files that are placed on your device to help this website to provide a better user experience. In general, cookies are used to retain user preferences, store information, and provide anonymised tracking data to third party applications like Google Analytics. As a rule, cookies will make your browsing experience better. However, you may prefer to disable cookies on this site and on others. The most effective way to do this is to disable cookies in your browser and by not selecting the 'Accept Cookies' option on our webpage. We suggest consulting the Help section of your browser or taking a look at the [About Cookies](#) website which offers guidance for all modern browsers.
- 12.2 Information about cookies: a cookie, also known as an HTTP cookie, web cookie, or browser cookie, is usually a small piece of data sent from a website and stored in a user's web browser while a user is browsing a website. When the user browses the same website in the future, the data stored in the cookie can be retrieved by the website to notify the website of the user's previous activity.
- 12.3 How we use cookies:
- 12.3.1 We may use the information we obtain from your use of our cookies for the following purposes:
- a) to recognise your computer when you visit our website;
  - b) to improve the website's usability;
  - c) to analyse the use of our website.
- 12.4 Below is a list of the cookies we use on this site, which is dynamically updated by the Company whenever new cookies are encountered and classified.
- 12.5 Strictly necessary cookies:
- 12.5.1 These cookies are necessary for the website to function and cannot be switched off in our systems. They are usually only set in response to actions made by you which

amount to a request for Services, such as setting your privacy preferences, logging in or filling in forms. You can set your browser to block or alert you about these cookies, but some parts of the site may not work then.

12.5.2 These cookies are used to make sure visitor page requests are routed to the same server in all browsing sessions and to maintain an anonymised user session by the server.

## 12.6 Performance and third-party cookies:

12.6.1 These cookies allow us to count visits and traffic sources, so we can measure and improve the performance of our site. They help us know which pages are the most and least popular and see how visitors move around the site. All information these cookies collect is aggregated and therefore anonymous. If you do not allow these cookies, we will not know when you have visited our site.

12.7 This website sets "first party" cookies through its use of Google Analytics. We use Google Analytics to provide us with non-personal site analytics, which in turn help us improve this website. Google Analytics tracking uses cookies in order to provide meaningful reports about web site visitors' but they do not collect Personal Data about you. Google Analytics sets or updates cookies only to collect data required for the reports. Additionally, Google Analytics only uses first-party cookies. This means that all cookies set by Google Analytics cannot be altered or retrieved by any service on any domain other than <https://www.vpaservices.net/>. Further detailed information on Google Analytics cookies can be [found here](#).

## 12.8 Cookie preferences:

12.8.1 Most browsers allow you to refuse to accept cookies. You can also delete cookies already stored on your computer:

- a) in Internet Explorer, you must manually delete cookie files (you can find instructions for doing so at <http://support.microsoft.com/kb/278835>)
- b) in Firefox, you can delete cookies by first ensuring that cookies are to be deleted when you "clear private data" (this setting can be changed by clicking "Tools", "Options" and "Settings" in the "Private Data" box) and then clicking "Clear private data" in the "Tools" menu.

12.8.2 This may temporarily affect the usability of this website. Please also note that if cookies have not been disabled in your browser they will be recreated upon your next visit to this website.

## 13. Data Breaches

13.1 The Company's website and web software runs on secured https protocol. However, in the case of a personal data breach to our website, our internal database(s) or the database(s) of any of our third-party data processors, shall without undue delay and, where feasible, not later than 72 hours after having become aware of it, notify the personal data breach to the DP Regulator unless the personal data breach is unlikely to result in a risk to the rights and freedoms of natural persons.