



PRIVACY NOTICE

PURPOSE OF THIS NOTICE

This notice describes how Beall Tax Consulting (“we”) collect and use personal data about you, in accordance with the General Data Protection Regulation (GDPR), the Data Protection Act, and any other national implementing laws, regulations and secondary legislation, as amended or updated from time to time, in Ireland (‘Data Protection Legislation’) and other countries.

Please read the following carefully to understand our practices regarding your personal data and how we will treat it.

ABOUT US

For the purpose of the Data Protection Act (“DPA”) and this notice, we are the ‘data controller’. This means that we are responsible for deciding how we hold and use personal data about you. We are required under the Data Protection Legislation to notify you of the information contained in this privacy notice.

Beall Tax Consulting Ltd. is the designated controller of your personal data and responsible for assisting with inquiries in relation to this privacy notice or our treatment of your personal data. For additional information please contact privacy@bealltaxconsulting.com.

HOW WE MAY COLLECT YOUR PERSONAL DATA

We obtain personal data about you when:

- You request a proposal from us in respect of the services we provide.
- You engage us to provide our tax services.
- You provide us the information necessary for us to provide our tax services.
- You contact us by email, telephone, or postal mail.

In addition, we may receive personal data about you from private third parties such as your employer, government entities (primarily the Internal Revenue Service, California Franchise Tax Board, the Irish Revenue, other state tax authorities, etc.), and publicly available.

THE KIND OF INFORMATION WE HOLD ABOUT YOU

The information we hold about you may include the following:

- Your personal details such as your name and address.
- Details of contact we have had with you in relation to the provision, or the proposed provision, of our services.
- Details of any services you have received from us.
- Our correspondence and communications with you.
- Information about any complaints and inquiries you make to us.
- Information we receive from other sources, such as publicly available information or information provided by your employer, IRS, Revenue, FTB, LinkedIn, etc.

HOW WE USE PERSONAL DATA WE HOLD ABOUT YOU

We may use information about you and if applicable your spouse and other family members (“You”) in order to provide the tax services you have requested from us and to contact you in relation to these services.

We use your information to the extent this is necessary for the performance of the services as requested by you in our Statement of Work, or because we have a legitimate interest in using your information in such a way.

We may process your personal data for certain additional purposes with your explicit consent. In the limited circumstances where your consent is required for the processing of your personal data then you have the right to withdraw your consent to processing for such specific purposes.

You do not have to provide information to us however we may not be able to provide the services you requested if you do not provide all or part of the information we request. We will not request more information than we believe is required.

Data retention

Your personal data will be retained in compliance with privacy laws and regulations and will not be retained for longer than required.

Where we enter into a contractual arrangement with you, our policy is to retain your information for sixteen years after your relationship with us ends, after which it will be deleted.

Where you decide not to enter into a contractual arrangement with us, we will retain your details for a period of 7 years after you provide it to us, after which it will be deleted.

Change of purpose

Where we need to use your personal data for another reason, other than for the purpose for which we collected it, we will only use your personal data where that reason is compatible with the original purpose.

Should it be necessary to use your personal data for a new purpose, we will notify you and communicate the legal basis which allows us to do so before starting any new processing.

DATA SHARING

Who can access your information?

We will share your personal data with third parties where we are required by law or where this is required for the provision of the services you have requested.

We may also disclose your data to relevant authorities (which could include tax or immigration authorities, depending on the nature of the services being provided to you).

Other than the above, we will not transfer your personal data to third parties unless we have your permission or are required by law to do so.

TRANSFERRING PERSONAL DATA OUTSIDE THE EUROPEAN ECONOMIC AREA (EEA)

Generally cross-border transfers of personal data outside the EEA are prohibited unless certain conditions are met. Rec. 111 Article 49(1)(b), (3) provides an exception to the general rule where the transfer of personal data is necessary for the performance of a contract between the data subject and the controller.

Where you enter into an engagement agreement with BTC for the provision of US tax services, we ask for you to sign a form providing explicit consent for BTC to transfer your personal data to the US as required in order to perform the services as outlined in the General terms of business.

Should you require further information about the protective measures, please contact us using the contact details outlined below.

DATA SECURITY

We have put in place commercially reasonable and appropriate security measures to prevent your personal data from being accidentally lost, used or accessed in an unauthorized way, altered or disclosed. In addition, we limit access to your personal data to those employees, agents, contractors and other third parties who have a business need to know. They will only process your personal data on our instructions and they are subject to a duty of confidentiality.

We have put in place procedures to deal with any suspected data security breach and will notify you and any applicable regulator of a suspected breach where we are legally required to do so.

RIGHTS OF ACCESS, CORRECTION, ERASURE, AND RESTRICTION

Your duty to inform us of changes

It is important that the personal data we hold about you is accurate and current. Should your personal information change, please notify us of any changes of which we need to be made aware by contacting us, using the contact details below.

Your rights in connection with personal data

You are legally entitled to request details of the personal data we hold about you.

You are entitled to confirm your personal data is accurate and current. You can request rectification, erasure, restriction of processing or a readily portable copy of your personal data by emailing our data protection point of contact privacy@bealltaxconsulting.com.

RIGHT TO WITHDRAW CONSENT

In the limited circumstances where you may have provided your consent to the collection, processing, and transfer of your personal data for a specific purpose, you have the right to withdraw your consent for that specific processing at any time. To withdraw your consent, please email our data protection point of contact privacy@bealltaxconsulting.com.

Once we have received notification that you have withdrawn your consent, we will no longer process your personal data for the purpose or purposes you originally agreed to, unless we have another legitimate basis for doing so in law.

CHANGES TO THIS NOTICE

Any changes we may make to our privacy notice in the future will be provided to you by email or will be published on www.bealltaxconsulting.com. This privacy notice was last updated on 13th July 2021.

COMPLAINTS OR REQUESTS

If you have any questions regarding this notice or if you would like to speak to us about the manner in which we process your personal data, please email our data protection point of contact at privacy@bealltaxconsulting.com

If you are not satisfied with how BTC resolved your complaint, you have the right to complain to your country's data protection authority.