

# QUARTER ONE FINANCE LIMITED PRIVACY POLICY

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Welcome to QuarterOne, an online forecasting and revenue management application designed especially for small and medium-sized businesses that already use SaaS CRM and accounting tools.

This Privacy Policy is intended to explain how we manage and protect personal data. Please read the policy carefully.

This notice applies across our [www.quarterone.com](http://www.quarterone.com) (the Website), all other websites that we own and operate and all services we provide, including our online and mobile forecasting and financial services products, and any other apps or services we may offer (for example, training, consulting and events). For the purpose of this notice, we'll just call them our 'services'.

When we say 'personal data' we mean identifiable information about you, like your name, email, address, telephone number, bank account details, payment information, support queries, community comments and so on. If you can't be identified (for example, when personal data has been aggregated and anonymised) then this notice doesn't apply. Check out our terms of use for more information on how we treat your other data.

We may need to update this notice from time to time. Where a change is significant, we'll make sure we let you know – usually by sending you an email.

## Who are 'we'?

When we refer to 'we' (or 'our' or 'us'), that means Quarter One Finance Limited and all its wholly owned subsidiaries. Our headquarters are in the UK. Address details for our offices are available on our Contact us page.

We provide an easy-to-use global online platform for small businesses and their advisors. If you want to find out more about what we do, see our About page on the Website.

For European Union data protection purposes, when we act as a controller in relation to your personal data, Quarter One Finance Limited (company number 10959586) is our representative in the European Union.

## Our principles of data protection

Our approach to data protection is built around four key principles. They're at the heart of everything we do relating to personal data.

**Transparency:** We take a human approach to how we process personal data by being open, honest and transparent.

**Security:** We champion industry leading approaches to securing the personal data entrusted to us.

**Stewardship:** We accept the responsibility that comes with processing personal data.

**Enablement:** We try to ensure that you have efficient use to use your personal data to empower business productivity and growth.

## How we collect your data

When you visit our websites or use our services, we collect personal data. The ways we collect it can be broadly categorised into the following:

**Information you provide to us directly:** When you visit or use some parts of our websites and/or services we might ask you to provide personal data to us. For example, we ask for your contact information when you sign up for a free trial, respond to a job application or an email offer, participate in community forums, join us on social media, take part in training and events, contact us with questions or request support. If you don't want to provide us with personal data, you don't have to, but it might mean you can't use some parts of our websites or services.

**Information we collect automatically:** We collect some information about you automatically when you visit our websites or use our services, like your IP address and device type. We also collect information when you navigate through our websites and services, including what pages you looked at and what links you clicked on. This information is useful for us as it helps us get a better understanding of how you're using our websites and services so that we can continue to provide the best experience possible (e.g., by personalising the content you see).

Some of this information is collected using cookies and similar tracking technologies. If you want to find out more about the types of cookies we use, why, and how you can control them, take a look at our cookie notice.

**Information we get from third parties:** The majority of information we collect, we collect directly from you. Sometimes we might collect personal data about you from other sources, such as publicly available materials or trusted third parties like our marketing and research partners. We use this information to supplement the personal data we already hold about you, in order to better inform, personalise and improve our services, and to validate the personal data you provide.

Where we collect personal data, we'll only process it:

- to perform a contract with you; or
- where we have legitimate interests to process the personal data and they're not overridden by your rights; or
- in accordance with a legal obligation; or
- where we have your consent.

If we don't collect your personal data, we may be unable to provide you with all our services, and some functions and features on our websites may not be available to you.

If you're someone who doesn't have a relationship with us, but believe that a QuarterOne subscriber has entered your personal data into our websites or services, you'll need to contact that QuarterOne subscriber for any questions you have about your personal data (including where you want to access, correct, amend, or request that the user delete, your personal data).

## **How we use your data**

First and foremost, we use your personal data to operate our websites and provide you with any services you've requested, and to manage our relationship with you. We also use your personal data for other purposes, which may include the following:

**To communicate with you.** This may include:

- providing you with information you've requested from us (like training or education materials) or information we are required to send to you
- operational communications, like changes to our websites and services, security updates, or assistance with using our websites and services
- marketing communications (about QuarterOne or another product or service we think you might be interested in) in accordance with your marketing preferences
- asking you for feedback or to take part in any research we are conducting (which we may engage a third party to assist with).

**To support you:** This may include assisting with the resolution of technical support issues or other issues relating to the websites or services, whether by email, in-app support or otherwise.

**To enhance our websites and services and develop new ones:** For example, by tracking and monitoring your use of websites and services so we can keep improving, or by carrying out technical analysis of our websites and services so that we can optimise your user experience and provide you with more efficient tools.

**To protect:** So that we can detect and prevent any fraudulent or malicious activity, and make sure that everyone is using our websites and services fairly and in accordance with our terms of use.

**To market to you:** In addition to sending you marketing communications, we may also use your personal data to display targeted advertising to you online – through our own websites and services or through third party websites and their platforms.

**To analyse, aggregate and report:** We may use the personal data we collect about you and other users of our websites and services (whether obtained directly or from third parties) to produce aggregated and anonymised analytics and reports, which we may share publicly or with third parties.

**To provide services to our subscribers:** In order to provide our services to a subscriber, we may use information provided to us by the Subscriber about their customers and prospective customers, which may include personal data. In such circumstances, we will only process such personal data to fulfil our obligations to our subscriber.

## **How we can share your data**

There will be times when we need to share your personal data with third parties. We will only disclose your personal data to:

- other companies in the QuarterOne group of companies

- third party service providers and partners who assist and enable us to use the personal data to, for example, support delivery of or provide functionality on the website or services, or to market or promote our goods and services to you
- regulators, law enforcement bodies, government agencies, courts or other third parties where we think it's necessary to comply with applicable laws or regulations, or to exercise, establish or defend our legal rights. Where possible and appropriate, we will notify you of this type of disclosure
- an actual or potential buyer (and its agents and advisers) in connection with an actual or proposed purchase, merger or acquisition of any part of our business
- other people where we have your consent.

### **International Data Transfers**

When we share data, it may be transferred to, and processed in, countries other than the country you live in – such as to the United States, where our data hosting provider's servers may be located, and to the Philippines, where some of our software development is performed. These countries may have laws different to what you're used to. Rest assured, where we disclose personal data to a third party in another country, we put safeguards in place to ensure your personal data remains protected.

For individuals in the European Economic Area (EEA), this means that your data may be transferred outside of the EEA. Where your personal data is transferred outside the EEA, it will only be transferred to countries that have been identified as providing adequate protection for EEA data, or to a third party where we have approved transfer mechanisms in place to protect your personal data – i.e., by entering into the European Commission's Standard Contractual Clauses, or by ensuring the entity is Privacy Shield certified (for transfers to US-based third parties). For further information, please contact us.

### **Security**

Security is a priority for us when it comes to your personal data. We're committed to protecting your personal data and have appropriate technical and organisational measures in place to make sure that happens.

### **Retention**

The length of time we keep your personal data depends on what it is and whether we have an ongoing business need to retain it (for example, to provide you with a service you've requested or to comply with applicable legal, tax or accounting requirements).

We may retain your personal data for as long as we have a relationship with you and for a period of time afterwards where we have an ongoing business need to retain it, in accordance with our data retention policies and practices. Following that period, we'll make sure it's deleted or anonymised.

### **Your rights**

It's your personal data and you have certain rights relating to it. When it comes to marketing communications, you can ask us not to send you these at any time – just follow the unsubscribe instructions contained in the marketing communication, or send your request to [privacy@quarterone.com](mailto:privacy@quarterone.com).

You also have rights to:

- know what personal data we hold about you, and to make sure it's correct and up to date

- request a copy of your personal data, or ask us to restrict processing your personal data or delete it
- object to our continued processing of your personal data

You can exercise these rights at any time by sending an email to [privacy@quarterone.com](mailto:privacy@quarterone.com).

If you're not happy with how we are processing your personal data, please let us know by sending an email to [privacy@quarterone.com](mailto:privacy@quarterone.com). We will review and investigate your complaint and try to get back to you within a reasonable time frame. You can also complain to your local data protection authority. They will be able to advise you how to submit a complaint.

### **How to contact us**

We're always keen to hear from you. If you're curious about what personal data we hold about you or you have a question or feedback for us on this notice, our websites or services, please get in touch.

As a technology company, we prefer to communicate with you by email – this ensures that you're put in contact with the right person, in the right location, and in accordance with any regulatory time frames.

Our email is [privacy@quarterone.com](mailto:privacy@quarterone.com)