BUSINESS ADVISORY LAUNCH PROGRAMME · STAND UP BASIC DATA-PROTECTION PRACTICE

Adviser data-protection starter pack

The everyday hygiene that keeps sensitive client data safe and lawful.

01 Publish and set the rules

- [ ] A privacy notice on your site: what you hold, why, how long, and people's rights.
- [ ] A retention rule, returning or deleting client financials at the end of an engagement.
- [ ] Only collect what a task actually needs.

02 Secure the data

- [ ] Encrypted, access-controlled cloud storage, not files on a laptop desktop.
- [ ] Multi-factor authentication on your storage and email.
- [ ] Sensitive files exchanged through a secure route, never a plain email attachment.

03 Be ready

Point to the ICO's guidance for the detail; this is not legal advice.

- [ ] Know what a personal-data breach is and the 72-hour reporting duty.
- [ ] Know that a subject-access request carries a one-month response duty.

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Want a website and portal built to hold this safely?

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