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1. What is this Data Protection Policy about?

Data protection is a matter of trust and your trust is important to us. Although we have not changed how we handle our personal data, due to the revised Data Protection Act coming into force on September 1, 2023, we are not only publishing a data protection policy for our website visitors, but also for our customers.

It is important to us that you are fully informed about the processing of your personal data. It is important to us that you understand:

- which of your personal data we process;
- for what purpose we use your personal data;
- who has access to your personal data;
- how long we keep your personal data;
- what happens to your personal data after our business relationship or the legal retention period.

This data protection policy applies to all our services and activities, unless we provide you with our own data protection policy.

2. Who is responsible for processing your data?

A specific company is responsible under data protection law for data processing in accordance with this data protection policy. This means that this company determines how the processing is carried out, for what purpose it is carried out and which principles should apply to it. The following company is generally responsible for data processing in accordance with this data protection policy:

Vertex Treuhand AG
Rigiweg 21A
6343 Holzhäusern ZG

Data protection officer: Alberto Martinez

For data protection inquiries, you can contact us as follows:

E-Mail-Address: info@vertextreuhand.com
Phone: +41 41 520 02 60

3. What is «personal data» and what does «processing» mean?

«Personal data» means data that relates to an identified or identifiable person, i.e. which allow conclusions to be drawn about their identity.

«Personal data that is particularly worthy of protection» are categories of personal data that are particularly sensitive, which is why their processing may be subject to special requirements. Personal data that is particularly worthy of protection is, for example, data that provides information about

religion or political views, health data and data about criminal or administrative sanctions and social assistance.

In section 5 you will find information on the data that we process within the scope of this data protection policy.

«Processing» means any handling of personal data, in particular obtaining, storing, using, disclosing and deleting.

4. Who is affected by data processing by us?

Our data processing may affect the following persons in particular ("data subjects"):

- persons using a service from us;
- Third parties (such as family members for tax returns, customers' suppliers for accounting, etc.) who are legally associated with the persons who use a service from us;
- Contact persons of our business partners.

5. What data from you do we process and for what purpose?

The data we process about you depends on your relationship with us. Depending on the occasion and purpose, we process different data from different sources. We primarily collect this data directly from you, e.g. when you place an order with us for our services or when you communicate with us.

We process personal data exclusively to fulfill the contract and comply with the legal requirements.

We mainly process the categories of data described below, although this list is not exhaustive. If data changes over time (e.g. in the event of a change of address or another mutation), we can keep both the current and the earlier status.

Base data

We define base data as the basic data that we need in addition to the contract data (name, address, e-mail address, telephone number) for the processing of our contractual and other business relationships or, if necessary, for marketing and advertising purposes (invitation to events, newsletters, etc.).

For customers and other contractual partners who are companies, we process data about our contact persons, e.g. name and address, information on titles, function in the company, qualifications and, if necessary, information on superiors and employees.

Tax data

We prepare tax returns for private individuals, self-employed and legal entities.

We receive the information required for this exclusively from you.

Financial accounting data

Our services also include keeping financial accounts. For this purpose, we process data about your debtors and creditors, any employees and bodies.

We receive the information we need for this from you, your suppliers and service providers, etc.

Payroll accounting data

We also do payroll accounting for our customers. For this purpose, we process data about the employees, which may also relate to data that provide information about social security processes or contain any administrative sanctions or social assistance measures.

We receive the information for processing your employees' payroll accounting exclusively from you and the responsible authorities.

Other data

We also collect data from you in other situations that we cannot describe conclusively in this data protection declaration.

In connection with official or judicial proceedings, for example, data is generated (e.g. file requests from tax authorities).

The data that we process in accordance with this data protection policy relates not only to our customers, but also to third parties (payroll accounting, tax returns for married couples and people with children, etc.). If you provide us with data about third parties, we will assume that you have the right to do so and that this data is correct and that you have informed the relevant people about it. By submitting data about third parties, you confirm this.

6. Who is your data shared with?

Our employees have access to your personal data, act according to instructions and are bound to confidentiality and secrecy when handling your personal data.

Furthermore, the following institutions may gain knowledge of your data:

Authorities

Where necessary to fulfill the order, data will be passed on to authorities.

Service provider

We mainly work with service providers in Switzerland in order to be able to provide our services. These services relate, for example, to IT services and marketing services. We provide service providers with the data required for their services and, through our contractual agreements and suitable instructions, ensure that data protection is also observed by the service providers during the entire processing time.

7. Will your data be disclosed abroad?

As explained in Section 6, not only do we process your personal data, but also our service providers, who are generally based in Switzerland.

Due to the use of the latest technologies (e.g. cloud solution), it cannot be ruled out that your data will be sent abroad - also outside the EU or the EEA.

The relevant countries may not have laws that protect your personal data to the same extent as in Switzerland or in the EU or the EEA area (e.g. USA). We therefore take contractual precautions (or oblige our service providers to take these) to contractually compensate for the weaker legal protection. For this purpose we usually use the standard contractual clauses issued or recognized by the European Commission and the Swiss Data Protection and Information Commissioner (FDPIC) (further information and a copy of these clauses can be found at [\(Standard contractual clauses for controllers and processors in the EU/EEA \(europa.eu\)\)](#)).

8. How long will your data be stored?

The legal obligation to keep our documents is generally ten years. In certain legally prescribed cases also longer (e.g. tax documents, documents in connection with real estate).

9. What rights do you have?

In connection with our data processing, you have the right:

- to request information as to whether and which of your data we are processing;
- Request corrections when data is inaccurate;
- to raise an objection and to demand the restriction or deletion of data, unless we are obliged or entitled to further processing;
- to request the release of certain personal data in a common electronic format or the transfer to another person in charge;
- to revoke your consent if our processing is based on your consent.

Please note that certain conditions must be met in order to exercise these rights and that exceptions or limitations may

apply (e.g. to protect third parties or trade secrets). We will inform you accordingly if necessary.

If you wish to exercise rights against us, please contact us in writing (see Section 2).

10. Can this Data Protection Policy be changed?

This data protection policy can be amended anytime. We would notify you in the same manner that you were brought to notice of this data protection policy. The version published on this website is the current version.