

Why do we have a privacy policy?

Firstly, we are under a legal obligation to let you know what personal information we collect about you, what we use it for and on what basis. We always need a good reason and we also have to explain to you your rights in relation to that information. You have the right to know what information we hold about you and to have a copy of it, and you can ask us to change or sometimes delete it.

The reasons we collect information are set out in this privacy policy, but we are not telling you all this just because we have to. As an accountant, most of what we do – from preparing your accounts to helping you set up your business – involves using personal information and we believe that it is very important for our customers to trust us with that information.

We want you to be confident that we will keep it secure and use it both lawfully and ethically, respecting your privacy.

Our privacy policy explains in detail how we use your personal information. It describes what we do (or what we may do) from the moment you approach us, through to providing and billing for that service. It also applies to marketing other products which we think will interest you.

But whatever we do with your information, we need a legal basis for doing it. We generally rely on one of three grounds (reasons) for our business processing. Firstly, if you take a service from us or would like us to act as your accountant, we are entitled to process your information so that we can provide that service to you and bill you for it.

Secondly, if we want to collect and use your information for other purposes, we may need to ask for your consent (permission) and, if we do, that permission must always be indicated by a positive action from you (such as ticking a box) and be informed. You are also free to withdraw your permission at any time. We tend to need permission when what is proposed is more intrusive (for example, sharing your contact details with other organisations so they can market their own products and services to you).

But we do not always need permission. In some cases, having assessed whether our use would be fair and not override your right to privacy, we may come to the view that it falls within the third ground – our 'legitimate interests' to use the information in a particular way without your permission (for example, to protect our network against cyber-attacks). But when we do this, we must tell you as you may have a right to object. And if you object specifically to us sending you marketing material, or to 'profiling you' for marketing purposes, we must then stop.

This is all set out in detail in this policy, which focuses more on those items that we think are likely to be of most interest to you. As well as covering processing for business purposes, we give you information on circumstances in which we may have to, or can choose to, share your information.

What kind of personal information do we collect and how do we use it?

The personal information we collect depends on the services in which we provide for you and how we use them.

You agree that we are entitled to obtain, use and process information you provide to us to enable us to discharge the services (as defined in our letter of engagement and supporting schedules and for other related purposes including:

- Updating and enhancing client records
- Analysis for management purposes
- Carrying out credit checks in relation to you
- Statutory returns
- Legal and regulatory compliance
- Crime prevention

We've explained the different ways we use your personal information below.

To manage your client record

- Your contact details and other information to confirm your identity and your communications with us. This includes your personal information such as name, gender, address, phone number, date of birth,

email address, national insurance number, unique tax payer reference, passwords and credentials (such as the security questions and answers we have for you), employment history, employee numbers, credit history, payroll and accounting data.

- Sensitive personal data referring to the above but includes genetic data and biometric data for example medical conditions, religious or philosophical beliefs, racial or ethnic origin, convictions.
- Your financial information.
- Your communications with us, including emails and phone calls.

Business interests

We'll use your personal information if we consider it is in our legitimate business interests so that we can operate as an efficient and effective business. We use your information to:

- Identify, and let you know about, products and services that interest you
- Detect and prevent fraud; and
- Secure and protect our network

How do we protect your personal information?

We have strict security measures to protect your personal information and any data stored and collected on your behalf.

How long do we keep your personal information?

As part of our professional body requirements we are required to keep your details for 6 years

A summary of your accounts for six years from the date of preparation and archive them thereafter unless specifically instructed otherwise.

Your contact details will remain on file all the while you remain one of our customers and for six years after.

Details relating to any dispute for six years after it was closed.

In other cases we'll store personal information for the periods needed for the purposes for which the information was collected or for which it is to be further processed and sometimes we'll keep it for longer if we need to by law, otherwise we delete it.

How to contact us and further details

You can get in touch with us by emailing jan@allaboutaccounting.co.uk or write to the address below marked for the attention of Jan Knight.

Brumijan Ltd Trading As

All About Accounting
West Gate Lodge
Cams Hall Estate
Fareham
Hampshire
PO16 8UP

Complaints

If you want to make a complaint on how we have handled your personal information please contact as above who will investigate the matter and report back to you. If you are still not satisfied after our response or believe we are not using your personal information in line with the law, you also have the right to complain to the data-protection regulator in the country where you live or work.

For the UK, that's the Information Commissioner – <https://ico.org.uk/>