Privacy Notice

We are committed to protecting your personal data.

Who we are

We are the **data controller** for the personal data you provide to us through our website, when you contact us, and when we provide services to you directly.

Where we process personal data on behalf of clients, such as for payroll services, we act as a **data processor** and process that data only on our client's instructions.

What information we collect

We may collect and use:

- your name;
- contact details, such as email address, telephone number and postal address;
- business name and job title;
- information you include in an enquiry, message or instruction;
- client identification, billing and payment information where relevant;
- employee and payroll information where we provide payroll services on behalf of clients;
- limited technical information, such as IP address.

How we collect your information

We collect personal data:

- directly from you when you contact us, complete forms, subscribe to updates or instruct us;
- from our clients where they ask us to provide services on their behalf;
- from public sources, regulators, HMRC, identity verification providers and professional advisers where necessary.

How we use your information

We use personal data to:

- respond to enquiries;
- provide accountancy, tax, payroll and related services;
- verify identity and carry out anti-money laundering and other regulatory checks;
- manage client relationships, records and billing;
- comply with legal, regulatory and professional obligations;
- improve our services and protect our systems;
- send updates or marketing where we are allowed to do so.

Our legal basis

We use personal data where necessary:

- to take steps at your request or to enter into or perform a contract;
- to comply with legal and regulatory obligations;
- for our legitimate interests, where these are not overridden by your rights;
- and, where required, with your consent.

Our legitimate interests include running and improving our practice, managing client relationships, recovering fees, keeping records, and maintaining the security of our systems and information.

Sharing your information

We may share personal data, where appropriate, with:

- IT, software, cloud storage and document management providers;
- payroll and business support providers;
- professional advisers;
- Consultants and subcontractors who assist us with providing services to you, with whom we maintain a contractual relationship
- HMRC, regulators, law enforcement, courts or other authorities where required by law;
- other third parties where necessary to provide our services or where you ask us to do so.

We require third parties to respect the security of personal data and to use it only for proper purposes.

International transfers

If any of our service providers transfer personal data outside the UK, we will take appropriate steps to ensure suitable safeguards are in place.

How long we keep it

We keep personal data only for as long as reasonably necessary for the purpose it was collected, including to meet legal, regulatory, tax, anti-money laundering, insurance and professional record-keeping requirements.

In most cases, client records are kept for at least 6 **years** after the end of the client relationship, although some records may need to be kept for longer where the law or our regulatory obligations require this.

Your rights

You may have the right to:

- access your personal data;
- ask us to correct inaccurate or incomplete data;
- ask us to erase personal data in certain circumstances;
- ask us to restrict how we use your data in certain circumstances;
- object to our processing in certain circumstances, including direct marketing;
- ask for a copy of certain data in a portable format;
- withdraw consent at any time where we rely on consent.

To exercise your rights, please contact us using the details below.

If you do not provide information

If you do not provide information we reasonably need, we may not be able to respond to your enquiry or provide services.

Marketing

If you subscribe to receive updates from us, or if you are an existing client and we are allowed to contact you about similar services, we may send you marketing by email. You can unsubscribe at any time using the link in the message or by contacting us.

Complaints

If you have concerns about how we use your personal data, please contact us first and we will try to resolve the issue.

You also have the right to complain to the Information Commissioner's Office (ICO), the UK regulator for data protection matters. https://www.ico.org.uk

Contact us

If you have any questions about this notice or how we use your personal data, please contact provided details in on our website.