

Your Privacy

Accounting Angels SW Ltd are committed to protecting your privacy when you use our services. The Privacy Notice below explains how we use information about you and how we protect your privacy.

If you have any concerns or questions about how we look after your personal information, please contact Heidi Channing or Lindsey Wright

Why we use personal information

Do you know what personal information is?

Personal information can be anything that identifies and relates to a living person. This can include information that, when put together with other information, can then identify a person. For example, this could be your name and contact details.

Why do we need your personal information?

We may need to use some information about you to:

- complete and file tax and VAT returns on your behalf
- provide a general bookkeeping service to you;
- arrange appointments and consultations with you;
- support a HMRC investigation;
- send you updates follow a new budget;
- remind you that you tax return is due;
- manage those services we provide to you;
- train and manage the employment of our workers who deliver those services;
- help investigate any worries or complaints you have about Accounting Angels;
- check the quality of services; and
- to help with research and planning of new services.

How the law allows us to use your personal information

There are a number of legal reasons on which we can rely when we collect and use your personal information. Generally we collect and use personal information where:

- you have entered into a contract with us
- it is required by law

We only use what we need!

Where we can, we'll only collect and use the personal information we need to deliver the service we are contracted to deliver.

If we don't need personal information we'll either keep you anonymous if we already have it for something else or we won't ask you for it.

Who do we share your information with?

We may share your personal information across the business where this is necessary, e.g. to provide a service. We will also share your information, as appropriate, with HMRC and NEST Pensions.

We will never share your personal information with another third party unless we have a lawful reason to do. However, we sometimes share your information when we feel there's a good reason that's more important than protecting your privacy. This doesn't happen often but we may share your information:

- in order to find and stop crime and fraud; or
- if there are serious risks to the public, our staff or to other professionals;
- to protect a child; or
- to protect adults who are thought to be at risk, for example if they are frail, confused or cannot understand what is happening to them.

From time to time we will use other organisations to either store personal information or help deliver our services to you. Where we have these arrangements there is always an agreement in place to make sure that the organisation complies with data protection law.

Where your information is shared, we'll make sure that we record what information we share and our reasons for doing so. We'll let you know what we've done and why if we think it is safe to do so, unless we are not required to do so. For example if a person is under investigation for fraud,

letting them know that an investigation is taking place may disrupt the investigation so we would not need to tell them.

Will I be contacted for marketing purposes?

Accounting Angels do not send marketing emails and otherwise contact you for marketing purposes and we do not make your personal details available to third parties for marketing purposes.

What you can do with your information

The law gives you a number of rights to control what personal information is used by us and how it is used by us.

You can ask for access to the information we hold on you

You have the right to ask for all the information we have about you and the services you receive from us. When we receive a request from you in writing, we must give you access to everything we've recorded about you.

However, we can't let you see any parts of your record which contain:

- confidential information about other people; or
- data a professional thinks will cause serious harm to you or someone else's physical or mental wellbeing; or
- if we think that giving you the information may stop us or another organisation from preventing or detecting a crime.

This applies to personal information that is in both paper and electronic records.

If you would like to ask for access to the information that we hold on you please email info@accounting-angels.com

You can ask to change information you think is inaccurate

You should let us know if you disagree with something written on your file.

We may not always be able to change or remove that information but we'll correct factual inaccuracies and may include your comments in the record to show that you disagree with it.

If you would like to ask to change information you think is inaccurate please send an email to info@accounting-angels.com or alternatively send a letter to:

Walker House
Market Place
Somerton
Somerset
TA11 7LZ

You can ask to delete information (right to be forgotten)

In some circumstances you can ask for your personal information to be deleted, for example:

- where your personal data is no longer needed for the reasons why it was collected in the first place;
- where you have removed your consent for us to use your information (where there is no other legal reason for us to use it);
- where there is no legal reason for the use of your information;
- where deleting the information is a legal requirement.

Where your personal information has been shared with others, we'll do what we can to make sure those using your personal information comply with your request for deletion.

Please note that we can't delete your information where:

- we're required to have it by law;
- it is used for freedom of expression;
- it is used for public health purposes;
- it is for, scientific or historical research, or statistical purposes where it would make information unusable; or
- it is necessary for legal claims.

If you would like to ask for your information to be deleted please send an email to info@accounting-angels.com or alternatively send a letter to:

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TA11 7LZ

You can ask to limit what we use your personal data for

You have the right to ask us to restrict what we use your personal information for where:

- you have identified inaccurate information, and have told us of it;
- where we have no legal reason to use that information but you want us to restrict what we use it for rather than delete the information altogether.

When information is restricted it can't be used other than to securely store the data and with your consent to handle legal claims and protect others, or where it's for important public interests of the UK.

Where restriction of use has been granted, we'll inform you before we carry on using your personal information.

You have the right to ask us to stop using your personal information for any Accounting Angels service. However, if this request is approved this may cause delays or prevent us delivering that service.

Where possible we'll seek to comply with your request, but we may need to hold or use information because we are required to by law.

If you would like to ask us to limit what we use your personal data for please send an email to info@accounting-angels.com or alternatively send a letter to:

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Somerset
TA11 7LZ

You can ask to have your information moved to another provider (data portability)

You have the right to ask for your personal data to be given back to you or another service provider of your choice in a commonly used format. This is called data portability.

However, this only applies if we're using your personal information with consent (not if we're required to by law) and if decisions were made by a computer and not a human being.

You can ask to have any computer made decisions explained to you, and details of how we may have 'risk profiled' you

You have the right to questions decisions made about you by a computer, unless it's required for any contract you have entered into, required by law, or you've consented to it.

You also have the right to object if you are being 'profiled'. Profiling is where decisions are made about you based on certain things in your personal information, e.g. your health conditions.

If you have any concerns regarding automated decision making, or profiling, please send an email to info@accounting-angels.com or alternatively send a letter to:

Walker House
Market Place
Somerton
Somerset
TA11 7LZ

How do we protect your information?

We'll do what we can to make sure we hold records about you (on paper and electronically) in a secure way, and we'll only make them available to those who have a right to see them. Examples of our security include:

- CCTV & Alarm system - our business premises is covered by CCTV and an alarm system which helps maintain the security of the building.
- Encryption - information is hidden so that it cannot be read without special knowledge (such as a password). This is done with a secret code or what's called a 'cypher'. The hidden information is said to then be 'encrypted'.
- Systems and networks access controls - allows us to stop people who are not allowed to view your personal information from getting access to it.

- Staff training - all staff are made aware of how to handle information and how and when to report when something goes wrong.

Where in the world is your information?

All of your personal information is stored on our servers and in our business premises which are based in the UK .

How long do we keep your personal information?

We are legally bound to keep records for 7 years after this all records are destroyed unless we need to keep them for longer to complete the service. Ie property portfolios or trust funds. This would be at our discretion.

Where can I get advice?

If you have any worries or questions about how your personal information is handled please contact Heidi Channing or Lindsey Wright – 01458 270280.

For independent advice about data protection, privacy and data sharing issues, you can contact the Information Commissioner's Office (ICO) at:

Information Commissioner's Office

Wycliffe House

Water Lane

Wilmslow

Cheshire

SK9 5AF

Tel: 0303 123 1113 (local rate) or 01625 545 745 if you prefer to use a national rate number.

Alternatively, visit ico.org.uk or email casework@ico.org.uk.

