
PRIVACY NOTICE

BACKGROUND:

Charltons Accountancy Ltd understands that your privacy is important to you and that you care about how your personal data is used. We respect and value the privacy of all of our clients and will only collect and use personal data in ways that are described here, and in a way that is consistent with our obligations and your rights under the law.

1. Information About Us

Charltons Accountancy Ltd

Limited Company registered in England under company number **04456572**
Registered address: The Offices, Middle Farm, Charlton Horethorne, Sherborne, Dorset, DT9 4NL

Email address: alison@charltonsaccountancy.co.uk

Telephone number: 01963 220262

Postal Address: The Offices, Middle Farm, Charlton Horethorne, Sherborne, Dorset, DT9 4NL

2. What Does This Notice Cover?

This Privacy Information explains how we use your personal data: how it is collected, how it is held, and how it is processed. It also explains your rights under the law relating to your personal data.

3. What is Personal Data?

Personal data is defined by the General Data Protection Regulation (EU Regulation 2016/679) (the "GDPR") and the Data Protection Act 2018 (collectively, "the Data Protection Legislation") as 'any information relating to an identifiable person who can be directly or indirectly identified in particular by reference to an identifier'.

Personal data is, in simpler terms, any information about you that enables you to be identified. Personal data covers obvious information such as your name and contact details, but it also covers less obvious information such as identification numbers, electronic location data, and other online identifiers.

The personal data that we use is set out in Part 5, below.

4. What Are My Rights?

Under the GDPR, you have the following rights, which we will always work to uphold:

- a) The right to be informed about our collection and use of your personal data. This Privacy Notice should tell you everything you need to know, but you can always contact us to find out more or to ask any questions using the details in Part 11.
- b) The right to access the personal data we hold about you. Part 10 will tell you how to do this.

- c) The right to have your personal data rectified if any of your personal data held by us is inaccurate or incomplete. Please contact us using the details in Part 11 to find out more.
- d) The right to be forgotten, i.e. the right to ask us to delete or otherwise dispose of any of your personal data that we have. Please contact us using the details in Part 11 to find out more.
- e) The right to restrict (i.e. prevent) the processing of your personal data.
- f) The right to object to us using your personal data for a particular purpose or purposes.
- g) The right to withdraw consent. This means that, if we are relying on your consent as the legal basis for using your personal data, you are free to withdraw that consent at any time.
- h) The right to data portability. This means that you can ask us for a copy of your personal data held by us to re-use with another service or business in many cases.
- i) Rights relating to automated decision-making and profiling. We do not use your personal data in this way.

For more information about our use of your personal data or exercising your rights as outlined above, please contact us using the details provided in Part 11.

It is important that your personal data is kept accurate and up-to-date. If any of the personal data we hold about you changes, please keep us informed as long as we have that data.

Further information about your rights can also be obtained from the Information Commissioner's Office or your local Citizens Advice Bureau.

If you have any cause for complaint about our use of your personal data, you have the right to lodge a complaint with the Information Commissioner's Office. We would welcome the opportunity to resolve your concerns ourselves, however, so please contact us, first, using the details in Part 11.

5. **What Personal Data Do You Collect?**

We may collect some or all of the following personal data (this may vary according to your relationship with us:

- Name;
- Date of birth;
- Gender;
- Address;
- Email address;
- Telephone number;
- Business name;
- Job title;
- Payment information;
- Unique Tax Identifier
- National Insurance Number

All information is usually obtained directly from you or from HM Revenue & Customs.

6. **How Do You Use My Personal Data?**

Under the GDPR, we must always have a lawful basis for using personal data. This may be because the data is necessary for our performance of a contract with you, because you have consented to our use of your personal data, or because it is in our legitimate business interests to use it. Your personal data may be used for one **or** all of the following purposes:

- Preparation of Accounts
- Bookkeeping
- Completion of VAT Returns
- Completion of Corporation Tax Returns
- Setting up Limited Company
- Completion of Confirmation Statements and other Companies House Forms
- Completion of Mortgage References
- Payroll & Auto-Enrolment Services
- Communicating with you
- Supplying you with information by email

7. **How Long Will You Keep My Personal Data?**

We will not keep your personal data for any longer than is necessary in light of the reason(s) for which it was first collected. Your personal data will therefore be kept for the following periods (or, where there is no fixed period, the following factors will be used to determine how long it is kept):

- Personal data held on databases internally will be held for time of our appointment or deleted no longer than 6 months after disengagement or earlier if requested.
- Accounting records and information will be held for the time of our appointment. For anyone who ceases to be a client the records will be held for a period of 6 years, as per our statutory obligations unless collected from our offices.
- Quickbooks data will be held for the time of our appointment. In the case of disengagement the Quickbooks account will be passed over to the client directly.

8. **How and Where Do You Store or Transfer My Personal Data?**

We will only store your personal data in the UK. This means that it will be fully protected under the GDPR.

9. **Do You Share My Personal Data?**

We will only share your personal data with third parties for the purposes of carrying out the services for which we have been contracted. Your information may be shared with the following third parties:

- HM Revenue & Customs
- Companies House
- Mortgage Companies (only if directly requested by you)
- Companies Made Simple (only if a request is made for a new company to be set up)
- NEST (if we operate Payroll for you)
- Our cloud- based database provider

- Milborne Port Computers (third party IT services)
- Quickbooks (only if you have purchased the software through Charltons Accountancy Ltd)
- Moneysoft Payroll (if we operate your payroll services)
(this list is not exhaustive)

In some limited circumstances, we may also be legally required to share certain personal data, which might include yours, if we are involved in legal proceedings or complying with legal obligations, a court order, or the instructions of a government authority.

If any of your personal data is required by a third party, as described above, we will take steps to ensure that your personal data is handled safely, securely, and in accordance with your rights, our obligations, and the third party's obligations under the law.

10. **How Can I Access My Personal Data?**

If you want to know what personal data we have about you, you can ask us for details of that personal data and for a copy of it (where any such personal data is held). This is known as a "subject access request".

All subject access requests should be made in writing and sent to the email or postal addresses shown in Part 11. To make this as easy as possible for you, a Subject Access Request Form is available for you to use. You do not have to use this form, but it is the easiest way to tell us everything we need to know to respond to your request as quickly as possible.

There is not normally any charge for a subject access request. If your request is 'manifestly unfounded or excessive' (for example, if you make repetitive requests) a fee may be charged to cover our administrative costs in responding.

We will respond to your subject access request within not more than one month of receiving it. Normally, we aim to provide a complete response, including a copy of your personal data within that time. In some cases, however, particularly if your request is more complex, more time may be required up to a maximum of three months from the date we receive your request. You will be kept fully informed of our progress.

11. **How Do I Contact You?**

To contact us about anything to do with your personal data and data protection, including to make a subject access request, please use the following details (for the attention of Alison Cooper (Data Protection Administrator))

Email address: office@charltonsaccountancy.co.uk

Telephone number: 01963 220262

Postal Address: The Offices, Middle Farm, Charlton Horethorne, Sherborne, Dorset, DT9 4NL

12. **Changes to this Privacy Notice**

We may change this Privacy Notice from time to time. This may be necessary, for example, if the law changes, or if we change our business in a way that affects personal data protection.

Any changes will be made available to you by post.