

Ashville Henderson Accountants - Privacy Policy 23/10/2020

Our contact details

Name: Anne Finnegan

Address: 15B Broadway, Higher Bebington, Wirral, CH63 5ND

Phone Numbers: 0151 538 2977. 07933 336 831

E-mail: anne@ashvillehenderson.com

Ashville Henderson Accountants are a Chartered Accountancy company registered in England with company number 4759868.

We are members of and abide by the governance of the Institute of Chartered Accountants in England and Wales (ICAEW).

We are registered fee payers with the Information Commissioner's Office (ICO) – registration number Z926536X

The type of personal information we collect

We currently collect and process the following information:

- Personal identifiers: Full name.
- Characteristics: Salutation, Date of Birth, Job title, Department, Nature of accountancy help needed.
- Contacts: Business name, Business address, Home address, Email address, Phone number/s.
- Financial: Bank account number and sort code, Salary details, Absence pay, Student loan, Maternity/Paternity pay, Attachments to earnings, Expenses, Overtime pay
- Tax: PAYE number, Tax code.
- Regulatory: Companies House Director other interests

We do not currently process any 'special category' personal data such as racial or ethnic origin, political opinions, religious beliefs, trade union membership, health, sex life or sexual orientation.

How we get the personal information and why we have it

Most of the personal information we process is provided to us directly by you or your employer for one of the following reasons:

- For processing payroll for your staff or for you
- To prepare and submit your personal or corporate tax returns
- For delivering a bookkeeping service to your business
- To prepare your annual accounts
- To prepare your VAT returns
- To deliver start up business advice to you
- To respond to an accountancy enquiry that you make through our website form.

We also receive personal information indirectly, from the following sources in the following scenarios:

- Companies House Director information when we first enrol you as a Corporate customer.

We use the information that you have given us in order to carry out our Accountancy services and finance or business advice.

We do not share this information with any other organisation other than those we are statutorily required to, such as HMRC, Companies House and Customs and Excise, or those you have given us permission to, such as Mortgage and Lettings Agents.

Lawful Bases for Processing

Under the General Data Protection Regulation (GDPR), there are 6 lawful bases that organisations rely on for processing personal data:

1. Consent
2. Contract
3. Legal obligation
4. Vital interests
5. Public task
6. Legitimate interests

Of these, the ones we rely on for processing your information are:

- **Your consent.** These are the occasions when you give your permission for data processing, for example, ticking a checkbox to opt in to receiving communications. Once you have given consent, you are able to remove or retract it at any time. You can do this by contacting Anne Finnegan, Ashville Henderson Accountants, 15B. Broadway, Higher Bebington, Wirral, CH63 5ND, or 0151 538 2977 or anne@ashvillehenderson.com

- **We have a contractual obligation.** For example, when you ask us for a quote or when we deliver a contractual service to you.

- **We have a legal obligation.** We use this as a basis for processing personal data in order to comply with the law. For example, to observe tax (HMRC) and employment laws.

- **We have a legitimate interest.** This refers to the few times when we may process data for our commercial interests or broader societal benefits, and where your own Rights are not overridden. This is most commonly used for direct marketing or for processing staff data.

How we store your personal information

Your information is stored electronically in our own building which we are the only keyholders for and which is alarmed. Your information is held on our encrypted secure company system or stored in a fireproof filing cabinet. On occasion we need to transport some data from you to us (or vice versa) by a memory pen drive. Such pen drives are encrypted and data is deleted from the drive once transferred to our secure system.

We keep contact and enquiry data from our website, calls and emails for 6 months to enable us to respond to follow up queries.

Customer emails, unless needing to be transferred to the customer contract, are kept for a period of 2 years.

For finance and tax related data, we are legally bound to keep this for a period of 6 years. Customer contracts are also retained for 6 years after the end of the contract as guided by the Limitation Act.

Subject Access Request data are held for 12 months after closure of the record.

After this time, we will dispose of your electronic data by deleting it and the deleted cache, and hardcopy data will be securely disposed of using an appropriate security level shredder.

Your Data Protection rights

Under data protection law, you have rights including:

Your right of access - You have the right to ask us for copies of your personal information. This is commonly known as a 'Subject Access Request'. You are not required to pay any charge for exercising your rights. If you make a request, we have one month to respond to you.

Please contact us at Anne Finnegan, Ashville Henderson Accountants, 15B. Broadway, Higher Bebington, Wirral, CH63 5ND, or 0151 538 2977 or anne@ashvillehenderson.com if you wish to make a request.

Your right to rectification - You have the right to ask us to rectify personal information you think is inaccurate. You also have the right to ask us to complete information you think is incomplete.

Your right to erasure - You have the right to ask us to erase your personal information in certain circumstances.

Your right to restriction of processing - You have the right to ask us to restrict the processing of your personal information in certain circumstances.

Your right to object to processing - You have the the right to object to the processing of your personal information in certain circumstances.

Your right to data portability - You have the right to ask that we transfer the personal information you gave us to another organisation, or to you, in certain circumstances.

How to complain

If you have any concerns about our use of your personal information, you can make a complaint to us at Anne Finnegan, Ashville Henderson Accountants, 15B. Broadway, Higher Bebington, Wirral, CH63 5ND, or 0151 538 2977 or anne@ashvillehenderson.com

You can also complain to the Information Commissioner's Office (ICO) if you are unhappy with how we have used your data.

The ICO's address:

Information Commissioner's Office
Wycliffe House
Water Lane
Wilmslow
Cheshire
SK9 5AF

Helpline number: 0303 123 1113

ICO website: <https://www.ico.org.uk>