

## Privacy Policy Notice

This privacy notice explains how Bean Counters use any personal information we collect about you.

### What we do

Bean Counters offers accountancy and business services to SME's and individuals from our office in Wellingborough. As well as the usual services of accounts and bookkeeping we can help with payroll, and VAT. For individuals we prepare and file Self-Assessment Tax Returns and help our clients to grow their businesses by giving them a clear view of their financial health. Wendy Tate is our GDPR Compliance Officer and she can be contacted directly by email at:

[wendy@bean-counters.co.uk](mailto:wendy@bean-counters.co.uk)

### What information do we collect about you?

We collect information about you when you engage us for accountancy, tax, payroll, bookkeeping and consultancy or business advice. This information will relate to your personal and financial circumstances. It may also include special categories of personal data if this is necessary for the provision of our services. An example of this is when we need to record information about your health because it will impact upon your financial situation. We collect this data in various ways including note taking during meetings; telephone conversations; correspondence and emails and collate it together with other information provided by you. Some information is passed to us via third parties such as HMRC. We may also obtain information from public sources such as Companies House.

### Information about connected individuals

We may need to gather personal information about your close family members and dependents to provide our service to you effectively. In such cases it will be your responsibility to ensure that you have the consent of the people concerned to pass their information on to us. We will provide a copy of this privacy notice for them or, where appropriate, ask you to pass the privacy information to them.

### Why do we need to collect and use your personal data?

The primary legal basis that we intend to use for the processing of your data is for the performance of our contract with you as detailed in our Letter of Engagement. The information that we collect about you is essential for us to be able to carry out the services that you require from us effectively. Without collecting your personal data, we would also be unable to fulfil our legal and regulatory obligations. You may withdraw consent for us to hold and use your personal data at any time by notifying emailing the GDPR Compliance Person

N.B. Some regulatory requirements mean we are legally obliged to retain certain data for a specified minimum period.

### How will we use the information about you?

We collect information about you in order to provide you with the services for which you engage us as detailed in our Letter of Engagement.

### How else will we use your data?

From time to time we will send you information by email including updates on changes to UK tax and other financial legislation, surveys, and invitations to events. You can unsubscribe from these emails at any time. We do not supply your details to any other organisation for marketing purposes.

### Who might we share your information with?

In order for us to deliver our services to you effectively we may, on occasion, send your details to third parties.

Where third parties are involved in processing your data we have a contract in place with them to ensure that the nature and purpose of the processing is clear, that they are subject to a duty of confidence in processing your data and that they will only act in accordance with our written instructions.

Where it is necessary for your personal data to be forwarded to a third party, we will use appropriate security measures to protect your personal data in transit. This will include the encryption of personal data transmitted electronically. To fulfil our obligation in respect of prevention of money laundering and other financial crime we may send your details to credit referencing agencies for identity verification purposes.

### How Long do we retain information?

During our relationship with you we will retain the personal data provided to us which is necessary to provide our services to you. We will take all reasonable steps to keep your personal data up to date throughout our relationship. We are also subject to regulatory requirements to retain your data for seven years. This is the minimum period, during which we have a legal obligation to retain your records. We reserve the right to retain data for longer where we believe it is in our legitimate interests to do so. You have the right to request deletion of your personal data. We will comply with this request, subject to the restrictions of our regulatory obligations and legitimate interests as noted above.

### How can you access the personal information we hold about you?

You have the right to request a copy of the information that we hold about you. If you would like a copy of some or all your personal information, please email or write to us using the contact details noted below. We have an obligation to ensure that your personal information is accurate and up to date. Please ask us to amend or remove any information that you feel is incorrect.

### How to contact us

If you have any questions about our privacy policy or information we hold about you, please contact us in the first instance by email at [wendy@bean-counters.co.uk](mailto:wendy@bean-counters.co.uk)

### How do you discuss or complain about our use of your personal data?

If you wish to discuss or complain about how your personal data is being processed by Bean Counters, please contact Wendy Tate our GDPR Compliance Officer.

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