



## 1. T.A.B Accounts and your privacy

A massive part of how we operate as a business is building and maintaining trust and we want you to have confidence that we will use your personal data in the right way. In doing so, we maintain your trust and your privacy. This Privacy Notice sets out all the things you need to know about the use of your personal data at T.A.B Accounts and your privacy rights.



## 2. Our contact details

If you have any questions or concerns about how we use your personal data or how you can enact your privacy rights, you can contact us using the contact information below:

Name: Tracy Ann Boniface

Phone Number: 07802 981999

E-mail: [tracy@tabaccounts.co.uk](mailto:tracy@tabaccounts.co.uk)



## 3. The types of data we collect from you

We collect and use the following types of personal data in order to provide you with our taxation, accountancy and bookkeeping services:



Name



Date of birth



National Insurance number

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Home and work address

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Contact information

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Salary data

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Savings and pension data

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Land and property data

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Account numbers and sort code

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Transactions and expenses data

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## 4. How and why we use your data

Depending on the type of service that we provide to you and your business, we may collect any of the types of personal data outlined in Section 3. We collect data from you or your employer over the phone, online or during our face to face meetings.

We collect and use your personal data for the following reasons:

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To enter into a contract of service or engagement letter with you

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To send you relevant marketing emails that you request or that we feel may interest you



To administer your payroll activities

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To manage your accounts, income and expenditure

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To process and manage your tax returns

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To process and manage your VAT returns

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To provide you with relevant and accurate tax advice

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To comply with relevant tax laws

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We will only use your personal data when the law allows us to. Most commonly, we will use your personal data in the following circumstances:

- Where it is necessary for our legitimate business interests and your interests and fundamental rights do not override those interests.
- Where we need to perform the contract for services we are about to enter into or have entered into with you.
- Where we need to comply with a legal or regulatory obligation.



## 5. Sharing your personal data

We do not sell data about our clients and we only share or disclose your data as authorised in this Privacy Notice.

We may share or disclose information with the following third parties:

- Suppliers: We may work with a variety of third party suppliers to perform our services such as website hosting or financial services companies who provide pensions advice.

- Legal/Regulatory Bodies: We are required to disclose your personal data in order to cooperate with legal or governmental authorities such as Her Majesty's Revenue and Customs (HMRC).



## 6. Protecting your personal data

We protect the personal data that we collect from you. In order to maintain the confidentiality, integrity and availability of your personal data we use physical security measures, anti-virus software, password encrypted files and we conduct regular back-ups.

We store all of your personal data in the United Kingdom on our own systems and on secure accountancy software that we use.



## 7. Storing your personal data

We will keep your personal data for only as long as necessary to provide you with our services and meet legal requirements. When we no longer need your personal data we will securely destroy it.

The default standard retention period for accounting records is six years plus one (i.e. six years after the last entry in addition to the current (plus one) accounting year).



## 8. Your privacy rights

Under privacy laws in the United Kingdom, you have the right to:

- Ask us for copies of your personal data.
- Ask us to update personal data that you think is inaccurate.
- Ask us to erase your personal data in certain circumstances.
- Ask us to stop using your personal data in a particular way in certain circumstances.

- Object to your personal data being used in a particular way or opt-out of receive marketing emails from us.
- Ask us to transfer your personal data to another organisation, or to you, in certain circumstances.

You can ask for any of these things for free and we will respond to each request within a month. You can contact us at any time using the contact information at the top of this Privacy Notice.



## 9. Additional information and advice

If you would like to understand more about your privacy rights, or if you'd like to complain about how we are using your personal data you can contact the Information Commissioner's Office (ICO) at:

Name: Information Commissioner's Office

Address: Wycliffe House, Water Lane, Wilmslow, Cheshire, SK9 5AF

Phone number: 0303 123 1113

Website: [www.ico.org.uk](http://www.ico.org.uk)

We have registered as a data controller with the ICO. You may need to reference our registration number if you ever need to talk to the ICO about us. Our registration number is ZA487178.