

Astrum Accountants Ltd takes the protection of your privacy very seriously. We will only use your personal information to deliver products and services that you have requested from us and to meet our legal obligations.

How do we collect information from you?

We obtain information about you when you engage us to deliver our products and services and when you contact us about our products and services.

What type of information do we collect from you?

The personal information we collect will vary depending on the products and services you engage us to deliver. The personal information required may include your name, your spouse's name, home address, previous address, telephone numbers, email address, Unique Tax Reference (UTR) number, National Insurance number, bank account details, IP address, PAYE references and various income and capital details.

How is your information used?

In general terms, and depending on the products and services you engage us to deliver, we may use your information to:

- contact you by post, email or telephone
- verify your identity where required
- understand your needs and how they may be met
- maintain our records in accordance with applicable legal and regulatory obligations
- process financial transactions
- prevent and detect crime, fraud or corruption
- carry out a range of accountancy and taxation services as applicable

We are required by legislation, other regulatory requirements and our insurers to retain your data where we have ceased to act for you. The period of retention required varies with the applicable legislation but is typically five to six years. To ensure compliance with all such requirements it is the policy of our practice to retain all data for a period of seven years from the end of the tax year for which we have provided you services.

Who has access to your information?

We will not sell your information to third parties and nor will we share your information with third parties for marketing purposes.

Any staff with access to your information have a duty of confidentiality under the ethical standards that we are required to follow.

We may pass your information to our third-party service providers, agents, subcontractors and other associated organisations for the purposes of completing tasks and providing services to you on our behalf, for example to process payroll. However, when we use third party service providers, we disclose only the personal information that is necessary to deliver the service and we require them to keep your information secure and not to use it for their own purposes.

To help you meet your compliance obligations, we may provide relevant personal information to Companies House or HMRC. In advance of submitting a tax return to HMRC on your behalf, we will ask you to approve the submission either by digital signature via our client portal or by signing an authorisation document.

We will not release your information to any other third parties unless you have requested that we do so, or we are required to do so by law, for example, by a court order or for the purposes of prevention and detection of crime, fraud or corruption.

How you can access and update your information

Keeping your information up to date and accurate is important to us. We commit to update the information that we hold about you when you notify us of any changes in writing.

You have the right to ask for a copy of the information we hold about you.

Security precautions are in place to protect the loss, misuse or unauthorised alteration of your information. Whilst we strive to protect your personal information, we cannot guarantee the security of any information you transmit to us in any way other than via our client portal.

Personal information you send us by email or post is done so at your own risk.

Once we receive your information, we add it to our systems. Where we have given, or where you have chosen, a password which enables you to access your information, you are responsible for keeping this password confidential. We recommend that you do not share your password with anyone.

Your data will usually be processed in our offices in the UK. However, to allow us to operate efficient digital processes, we sometimes need to store information on servers located outside the UK. We take the security of your data seriously and so all our systems have appropriate security in place that comply with applicable legislative and regulatory requirements.

Your choices

We may occasionally contact you by post, email or telephone with details of any changes in legal and regulatory requirements or other developments that may be relevant to your financial and tax affairs and, where applicable, how we may assist you further. If you do not wish to receive such information from us, please let us know by visiting the consent portal on our website.

Your rights

Access to your information: You have a right to request a copy of the personal information we hold about you.

Correcting your information: We want to make sure that your personal information is accurate, complete and up to date and you may ask us to correct any personal information about you that you believe is incorrect.

Deletion of your information: You have a right to ask us to delete personal information about you where:

- you consider that we no longer require the information for the purposes for which it was obtained;
- you have validly objected to our use of your personal information; see 'Objecting to how we may use your information' below; and
- our use of your personal information is contrary to law or our other legal obligations.

Restricting how we may use your information: This right may apply where there is no longer a basis for using your personal information but you do not want us to delete the data. Where this

right is validly exercised, we may only use the relevant personal information with your consent, for legal claims or where there are other public interest grounds to do so.

Objecting to how we may use your information: Where we use your personal information to perform tasks carried out in the public interest then, if you ask us to, we will stop using that personal information unless there are overriding legitimate grounds to continue.

We keep this privacy notice under regular review and will place any updates on website www.astrum.accountants

Complaints.

We aim to resolve complaints about how we handle your personal information directly; however, you also have a right to raise a complaint with the Information Commissioner's Office; <https://ico.org.uk/concerns>.

This privacy notice was last updated on 8th May 2018.