

## PRIVACY POLICY

### WHAT INFORMATION DOES BSB ACCOUNTING COLLECT ABOUT YOU AND FOR WHAT PURPOSES

- Identity Data: may include title, first name, maiden name, surname, marital status, date of birth, gender – identification purposes
- Contact Data: may include billing address, delivery address, email address, telephone numbers – contact purposes between BSB Accounting and the client
- Financial Data: may include bank account, payment card details – payment, direct debit setup purposes (e.g. to arrange income tax refund through self assessment) – payment / refund arrangement purposes
- Transaction Data: may include details about payments between BSB Accounting and the client or details about other purchases made by the client – detailing and identification information purposes
- Technical Data: may include login data, operating system and platform and other technology – technical purposes
- Marketing and Communications Data: may include your preferences in receiving marketing communications from BSB Accounting

BSB Accounting will only use clients' personal data when legally permitted.

Sensitive Data: BSB Accounting will not collect any sensitive data about clients. (data which refers to data about ethnicity, religion, philosophical beliefs, sex life, sexual orientation, political opinion, trade union membership, health and genetic and biometric data, criminal convictions and offences.

Personal data might be processed without clients' knowledge and consent – where this is required by law

### HOW BSB ACCOUNTING COLLECTS PERSONAL DATA

Direct interactions: by filling in forms (via website, email, phone or post)

- When you become an employee
- Request a quote for services
- Signing up for accountancy, bookkeeping or payroll etc services
- Subscribe to services or newsletter publications
- Request resources or marketing to be sent
- Request feedback

Automated technologies and interactions:

Third parties or publicly available sources: technical data from Google, or other search engines.

### WHY BSB ACCOUNTING PROCESSES PERSONAL DATA

Clients' personal data might be processed for more than one lawful ground, depending on the specific purpose.

- Registration as new customer
- Process and deliver services including: manage payments, fees and charges, collect and recover any money owed
- manage the client – accountant relationship by notification in changes of Privacy Policy, requesting a review
- deliver relevant content and advertisements and measure and understand effectiveness of advertising
- use data analytics to improve products/services, website, customer relationship and experiences, suggestions and recommendations about new services

## MARKETING COMMUNICATIONS

Clients will receive marketing communications if they have

- requested information or purchased services from BSB Accounting
- provided details and opted to receive marketing communications

## DISCLOSURES OF YOUR PERSONAL DATA TO OTHERS

Clients' data may be shared internally, personal data may have to be shared with the parties set out below:

HM Revenue and Customs – Government

Quickbooks – Accounting software

Kashflow – Accounting software

Xero – Accounting software

SageOne – Accounting Software

Moneysoft – Payroll Manager software

Third parties privacy policy can be found on their website, please check .

## INTERNATIONAL TRANSFERS

Countries outside of the European Economic Area (EEA) do not always offer the same levels of protection to your personal data, so European law has prohibited transfers of personal data outside of the EEA unless the transfer meets certain criteria.

Whenever we transfer your personal data out of the EEA, we do our best to ensure a similar degree of security of data by ensuring at least one of the following safeguards is implemented:

We will only transfer your personal data to countries that have been deemed to provide an adequate level of protection for personal data by the European Commission; or

## DATA SECURITY

Norton Antivirus is installed on all PC's and laptops as appropriate security measures to prevent your personal data from being accidentally lost, used or accessed in an unauthorised way, altered or disclosed.

We limit access to your personal data to those employees, agents, contractors and other third parties who have a business need to know such data. They will only process your personal data on our instructions and they are subject to a duty of confidentiality.

Procedures are in place to deal with any suspected personal data breach and will notify you and any applicable regulator of a breach where we are legally required to do so.

## LINKS TO OTHER WEBSITE

Our website and newsletters may contain links to other websites of interest. However, once you have used these links to leave our site, you should note that we do not have any control over that other website.

Therefore, we cannot be responsible for the protection and privacy of any information which you provide whilst visiting such sites and such sites are not governed by this privacy statement. You should exercise caution and look at the privacy statement applicable to the website in question.

## DATA RETENTION

We will only retain your personal data for as long as necessary to fulfil the purposes we collected it for, including for the purposes of satisfying any legal, accounting, or reporting requirements.

To determine the appropriate retention period for personal data, we consider the amount, nature, and sensitivity of the personal data, the potential risk of harm from unauthorised use or disclosure of your personal data, the purposes for which we process your personal data and whether we can achieve those purposes through other means, and the applicable legal requirements.

By law we have to keep basic information about our customers (including Contact, Identity, Financial and Transaction Data) for six years after they cease being customers for tax purposes.

In some circumstances you can ask us to delete your data: see below for further information.

In some circumstances we may anonymise your personal data (so that it can no longer be associated with you) for research or statistical purposes in which case we may use this information indefinitely without further notice to you.

## YOUR LEGAL RIGHTS

As a data subject, you have a number of rights. You can access and obtain a copy of your data on request; require us to change incorrect or incomplete data; require us to delete or stop processing your data, for example where the data is no longer necessary for the purposes of processing; and object to the processing of your data where we are relying on our legitimate interests as the legal ground for processing.

If you would like to exercise any of these rights, please email [admin@bsbaccounting.co.uk](mailto:admin@bsbaccounting.co.uk). If you believe that we have not complied with your data protection rights, you can complain to the Information Commissioner. More information is available at <https://ico.org.uk/for-organisations/guide-to-the-general-data-protection-regulation-gdpr/individual-rights/>

You will not have to pay a fee to access your personal data (or to exercise any of the other rights). However, we may charge a reasonable fee if your request is clearly unfounded, repetitive or excessive. Alternatively, we may refuse to comply with your request in these circumstances.

## COOKIES

You can set your browser to refuse all or some browser cookies, or to alert you when websites set or access cookies. If you disable or refuse cookies, please note that some parts of this website may become inaccessible or not function properly.