

Privacy Notice for Ross + Partners

Ross + Partners (“we”, “us”, “our”) takes the protection of your privacy very seriously. This notice explains how we collect, use, store and protect your personal information when you engage us for accountancy, tax and advisory services, or use our website. We are committed to compliance with the UK General Data Protection Regulation (UK GDPR), the Data Protection Act 2018, and the standards set by our regulatory body, the Association of Chartered Certified Accountants (ACCA).

Who we are

Ross + Partners is the data controller for the personal information described in this notice. Our business address is Suite 1b1, Argyle House, Joel Street, HA6 1NW. We are registered with the Information Commissioner's Office (ICO), registration number ZA414627.

How do we collect information from you?

We obtain information about you when you engage us to deliver our services and/or when you use our website, for example, when you contact us about our services or complete a form.

What type of information do we collect from you?

The personal information we collect from you will vary depending on which services you engage us to deliver. The personal information we collect might include your name, address, telephone number, email address, your Unique Taxpayer Reference (UTR), your National Insurance number, bank account details, identity verification documents (such as a passport or driving licence) collected for anti-money laundering purposes, your IP address, and which pages you may have visited on our website and when.

Our legal basis for using your information

We rely on the following legal bases, depending on the purpose:

- Performance of a contract – to provide the accountancy and advisory services you have engaged us for.
- Legal obligation – to comply with our duties under tax legislation, the Money Laundering, Terrorist Financing and Transfer of Funds (Information on the Payer) Regulations 2017 (as amended), and ACCA's regulatory and ethical requirements.
- Legitimate interests – for example, to maintain the security of our systems, or to contact existing clients about relevant service updates, where this does not override your rights.
- Consent – where we ask for your specific agreement, for example for certain marketing communications or non-essential cookies, which you may withdraw at any time.

How is your information used?

In general terms, and depending on which services you engage us to deliver, as part of providing our agreed services we may use your information to:

- contact you by post, email or telephone
- verify your identity, including carrying out client due diligence checks required under the Money Laundering Regulations
- understand your needs and how they may be met

- maintain our records in accordance with applicable legal, regulatory and ACCA professional requirements
- process financial transactions
- prevent and detect crime, fraud or corruption, and meet our reporting obligations to relevant authorities (including, where required, the National Crime Agency)

Anti-money laundering and identity verification

As a firm regulated by ACCA for anti-money laundering supervision, we are required by law to carry out due diligence checks on our clients before we can act for them, and on an ongoing basis thereafter. This may include verifying your identity using documents you provide or, where appropriate, electronic verification services. We are legally obliged to retain this information and, in certain circumstances, may be required to report information to the National Crime Agency without informing you that we have done so.

How long do we keep your information?

We are required by legislation, other regulatory requirements (including ACCA's rules) and our insurers to retain your data for a period after we have ceased to act for you. The period of retention required varies depending on the applicable legislation but is typically five or six years. To ensure compliance with all such requirements, it is the policy of the firm to retain client data for a period of six years from the end of the period concerned, save where a longer period is required by law (for example, certain trust or tax matters).

Who has access to your information?

We will not sell or rent your information to third parties. We will not 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 this firm is required to follow as members of ACCA.

Third party service providers working on our behalf

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, cloud accounting and practice management software, payroll processing, or basic bookkeeping support. When we use third party service providers, we disclose only the personal information necessary to deliver the service, and we have contracts in place that require them to keep your information secure and not use it for their own purposes.

We use cloud-based software to deliver our services, and some of our software providers may store or process data outside the UK, including in the European Economic Area or elsewhere. Where this is the case, we ensure appropriate safeguards are in place, such as the UK International Data Transfer Agreement, UK-approved Standard Contractual Clauses, or reliance on an adequacy decision recognised under UK law. We carry out due diligence on our software providers to satisfy ourselves that your information remains protected to UK GDPR standards wherever it is processed.

We will not release your information to 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, HMRC information notice, or for the purposes of prevention and detection of crime, fraud or corruption.

Cookies and website usage data

Our website may use cookies and similar technologies to help it function correctly and to understand how visitors use it. Where we use any cookies beyond those strictly necessary for the website to operate, we will ask for your consent via a cookie banner when you first visit. You can control or delete cookies through your browser settings at any time.

How you can access and update your information

Keeping your information up to date and accurate is important to us. We commit to regularly review and correct, where necessary, the information that we hold about you. If any of your information changes, please email or write to us, or call us using the contact information below. You have the right to ask for a copy of the information Ross + Partners holds about you.

Security precautions in place to protect your information

Whilst we strive to protect your personal information, we cannot guarantee the security of any information you transmit to us, and you do so at your own risk. Once we receive your information, we make our best effort to ensure its security on our systems through appropriate technical and organisational measures, including access controls, encryption where appropriate, and staff training.

Where we have given, or you have chosen, a password which enables you to access information, you are responsible for keeping this password confidential. We ask you not to share your password with anyone. Our offices are based in the UK; see the section above regarding our use of cloud software providers and any associated international data transfers.

Your choices

We may occasionally contact you by post, email or telephone with details of changes in legal and regulatory requirements or other developments that may be relevant to your 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 contacting us as set out below.

Your rights

Under UK GDPR, you have the following rights in relation to your personal information:

- Access – you have the right to request a copy of the personal information we hold about you.
- Correction – you may ask us to correct any personal information about you that is inaccurate, incomplete or out of date.
- Deletion – you have the right to ask us to delete personal information about you, where we no longer require it, you have validly objected to our use of it, or our use of it is otherwise unlawful (this right does not override our legal obligation to retain certain client records).
- Restriction – in some cases, you may ask us to restrict how we use your personal information, for example while we check its accuracy.
- Objection – where we rely on legitimate interests to use your personal information, you may object to that use; you also have an absolute right to object to use of your data for direct marketing.

- Complaint – you have the right to lodge a complaint with the Information Commissioner's Office (ICO) if you believe we have not handled your personal information correctly. The ICO can be contacted at ico.org.uk or on 0303 123 1113.

Please contact us using the details below if you wish to exercise any of these rights.

Automated decision-making

We do not use your personal information for any automated decision-making that produces legal or similarly significant effects on you.

Changes to our privacy notice

We keep this privacy notice under regular review and will place any updates on our website at www.rosspartners.co.uk.

This privacy notice was last updated on 19 June 2026.

Contact information

Please contact us at info@rosspartners.co.uk for any further information, or to exercise any of your rights as set out above.