

Privacy Notice

This notice describes how we collect and use personal data about you, in accordance with the General Data Protection Regulation (GDPR), the Data Protection Act 2018.

Abacus Financial Accounting Ltd takes the protection of your privacy very seriously. We will only use your personal information to deliver the services you have requested from us, and to meet our legal and regulatory responsibilities.

How we may collect personal information from you?

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

What information do we collect from you?

The information we obtain from you varies depending on which services you engage us to perform. It may include your name, address, telephone number, email address, date of birth, marital status, your Unique Tax Reference (UTR) number, your National Insurance number and bank account details.

How is your personal information used?

This will depend on the services you engage us to perform. When providing our agreed services, we may use your information to:

- contact you by post, telephone or email
- verify your identity where required
- maintain our records to comply with legal and regulatory obligations
- process financial transactions
- prevent and detect crime and fraud

We are required by legislation, regulatory requirements and our insurers to retain your data even when we have ceased to act for you. The period required varies with the relevant legislation but is usually six years. To ensure compliance with all such requirements it is our firm's policy to retain all data for a period of a six to seven years from the end of the period concerned.

Who do we share your personal information with?

We will not sell your information to third parties and we will not share your information with third parties for any marketing purposes.

All our staff with access to your information have a duty of confidentiality under the ethical standards which we are all required to follow within the firm.

We may share your personal data with third party providers when necessary as explained below.

Third Party Service Providers

The following third party service providers may be used as required: IT and cloud services, software providers, professional advisory services and banking services.

All our third-party service providers are required to take reasonable and appropriate security measures to protect your personal data. We only permit our third-party service providers to process your personal data for specified purposes and in accordance with our instructions.

Please rest assured that we will not provide your information to third party service providers unless you have requested that we do so, or we are required to do so by law, such as a court order or for the purposes of prevention and detection of crime, fraud or corruption.

How you can access and maintain your information

We do not have an online facility for you to update or access your personal information, however the accuracy of your personal information is very important to us. We regularly review and correct the personal information that we hold about you.

If any of your personal information changes, please call, email or write to us as per the contact information shown at the end of this notice or on our website.

Under certain circumstances, by law you have the right to ask for a copy of the personal information that Abacus Financial Accounting Ltd holds about you.

Security precautions we have in place to protect the loss, misuse or alteration of your information

Whilst we make every effort to protect your personal information, we are not able to offer any guarantees regarding the security of the information you send to us, and you therefore do so at your own risk.

We have put in place reasonable and appropriate security measures to prevent your personal data from being accidentally lost, used or accessed in an unauthorised way.

Third parties who require information will only process your personal data on our instructions and they are subject to a duty of confidentiality.

We have put in place procedures to deal with any suspected data security breach and will notify you and any applicable regulator of a suspected breach where we are legally required to do so.

Contacting you and your choices

We may occasionally contact you by email with details of any changes in legal and regulatory requirements or other developments that may be relevant to our clients, or if we can assist you further.

If you do not wish to receive information such as this from us, please let us know by contacting us as indicated in the Contact information section below.

Your rights of access to information

Access to your personal information: As stated above, you have the right to request a copy of the personal information that we hold about you.

Correcting your personal information: We want to ensure that your personal information is accurate, complete and up to date. You can ask us to correct any information about you if you require.

Deleting your personal information: You have the right to request that we delete personal information about you where:

- you consider that we no longer require the information for the purposes for which it was originally obtained
- you have validly raised an objection to our use of your personal information – please see ‘Objection to use of your personal information’ below
- the use of your personal information is contrary to law or our other legal obligations

Restricting how we may use your information

You may request us to restrict how we use your personal information. This right could apply in such circumstances where there is no longer a reasonable basis for using your personal information, but where you do not want us to delete the data. Where this request is valid, we may only use the relevant personal information with your prior consent, for legal claims or where there are other public interest reasons.

Objection to use your personal information

Where we use your personal information to carry out tasks in the public interest, should we receive a valid request to stop, we will cease using that personal information unless there are overriding legitimate grounds to continue. You have the right at all times to require us to stop using your personal information for direct marketing purposes, however this is not something we will do as a firm.

Please contact us in any of the ways set out in the Contact information section below if you wish to exercise these rights.

Changes to our privacy notice

We will keep this privacy notice under review and will place any updates on our website: www.abacusfinancialaccounting.co.uk

Paper copies or a PDF copy of the privacy notice may also be obtained by requesting them from Lee Cuthbert.

Contact information

Lee Cuthbert (Director)
Abacus Financial Accounting Ltd

Registered Office: 79 Lullingstone Crescent
Ingleby Barwick
TS17 5GR

Email: info@abacusfinancialaccounting.co.uk

Telephone: 01642 767003

Complaints

We will always aim to resolve complaints about how we store and process your personal information directly with you, however you also have the right to lodge a complaint with the Information Commissioner's Office at:

Information Commissioner's Office

Wycliffe House

Water Lane

Wilmslow

Cheshire

SK9 5AF

Telephone: 0303 123 1113 or 01625 545 745

Website: <https://ico.org.uk/concerns>