

PRIVACY POLICY

Last revised: May 2018

Numbers and Beyond is committed to ensuring that your privacy is protected. This privacy policy sets out how Numbers and Beyond uses and protects any information that you give to us. Should we ask you to provide certain information by which you can be identified you may be assured that it will only be used in accordance with this privacy policy.

We may modify or amend this privacy statement from time to time. To let you know when we make changes to this privacy statement, we will amend the revision date at the top of this page. The new modified or amended privacy statement will apply from that revision date. Therefore, we encourage you to periodically review this statement to be informed about how we are protecting your information.

This policy was updated in May 2018 to reflect EU data protection law (including the General Data Protection Regulation 2016/679 (the “GDPR”). For the purposes of GDPR, Numbers and Beyond is both a ‘data controller’ and ‘data processor’ of your personal information.

What we collect

We may collect the following information:

- Name and job title
- Contact information including telephone number, email address and home address
- Personal data required for tax and accounting returns, e.g. date of birth, national insurance number, unique tax reference, salary
- Copy of passport required under anti-money laundering regulations
- Other information relevant to customer surveys and/or offers

How we collect personal information

We collect personal information when you provide it to us as you navigate the website.

We also collect personal information when you provide it to us when you enquire about our services, engage our services or send us a communication.

What we do with the information we gather

We require this information to provide accounting and tax services, to understand your needs, and in particular for the following reasons:

- As part of our client and engagement acceptance, we carry out searches using publicly available sources (e.g. internet searches) to identify politically exposed persons and heightened risk individuals and organisations and check that there are no issues that would prevent us from working with a particular client.
- Providing professional services, e.g. preparing returns and information to be submitted to HM Revenue and Customs and Companies House.
- Internal record keeping.
- We may use the information to improve our products and services.
- We may periodically send promotional emails about new products, special offers or other information which we think you may find interesting. We will do so using the email address which you have provided.
- Occasionally, we may also use your information to contact you for market research purposes.
- We may contact you by email, phone, post or newsletter. We may use the information to customise the website according to your interests.

How we keep your personal information secure

We are committed to ensuring that your information is secure. In order to prevent unauthorised access or disclosure, we have put in place suitable physical, electronic and managerial procedures to safeguard and secure the information we collect.

We store personal information on secure devices/servers that are managed by us and our service providers. We may also store personal information in hard copy files that are kept in a secure location in the UK. Personal information that we store or transmit is protected by security and access controls, including username and password authentication, two-step authentication, and data encryption where appropriate.

We retain the personal data processed by us for as long as is considered necessary for the purpose for which it was collected (including as required by applicable law or regulation).

In the absence of specific legal, regulatory or contractual requirements, our baseline retention period for records and other documentary evidence created in the provision of services is 6 years.

When we disclose your personal information

We will disclose personal information to the following recipients:

1. HM Revenue and Customs and Companies House in accordance with the services that you have requested us to perform, acting as your agent.
2. Third parties that provide products or services that we purchase on your behalf and make available to you, e.g. bookkeeping software.
3. Our professional advisers (lawyers, specialist accountants, financial advisers etc.) which are located in the UK.
4. Other regulators and government authorities in connection with compliance procedures and obligations;
5. A prospective purchaser and their professional advisers should Numbers and Beyond seek to sell all or part of its assets or business;
6. A third party, in order to enforce or defend our rights, or to address financial or reputational risks; and
7. Other recipients where we are authorised or required by law to do so.

Where we transfer and/or store your personal information

We are based in the UK so your data will generally be processed in UK. Some of the recipients we have described above, and to whom we disclose your personal information, may be based outside the UK. In order to protect your information, we take care to work with subcontractors and service providers who adhere to EU Data Protection law.

Controlling your personal information

You have the right to make a request to access personal information we hold about you and to request corrections of any errors in that data. To make an access or correction request, please contact Linda Foster.

You may choose to restrict the collection or use of your personal information in the following ways:

Whenever you are asked to fill in a form on the website, look for the box that you can click to indicate that you do not want the information to be used by anybody for direct marketing purposes. If you have previously agreed to us using your personal information for direct marketing purposes, you may change your mind at any time by writing to us at lindafoster@numbersandbeyond.co.uk

We will not sell, distribute or lease your personal information to third parties unless we have your permission or are required by law to do so. We may use your personal information to send you promotional information about third parties which we think you may find interesting if you tell us that you wish this to happen.

You also have choices about cookies, as described below. By modifying your browser preferences, you have the choice to accept all cookies, to be notified when a cookie is set, or to reject all cookies. If you choose to reject cookies some parts of our website may not work properly in your case.

How we use cookies

A cookie is a small file which asks permission to be placed on your computer's hard drive. Once you agree, the file is added and the cookie helps analyse web traffic or lets you know when you visit a particular site. Cookies allow web applications to respond to you as an individual. The web application can tailor its operations to your needs, likes and dislikes by gathering and remembering information about your preferences.

Overall, cookies help us provide you with a better website, by enabling us to monitor which pages you find useful and which you do not. A cookie in no way gives us access to your computer or any information about you, other than the data you choose to share with us.

You can choose to accept or decline cookies. Most web browsers automatically accept cookies, but you can usually modify your browser setting to decline cookies if you prefer. This may prevent you from taking full advantage of the website.

Links to other websites

Our website 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.

Complaints

If you are concerned about an alleged breach of privacy law or any other regulation by Numbers and Beyond, you should contact Linda Foster. Your complaint will be investigated and you will be given information about how it will be handled.

If you are not satisfied with the way in which Numbers and Beyond has resolved your complaint, you have the right to complain to the data protection authority.