

R A Book Keeping

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Privacy Policy

This is the privacy notice of R A Book Keeping In this document, "we", "our", or "us" refer to R A Book Keeping

Our registered office is at 11 Albany Close, Trowbridge, BA14 7LN

Our Data Protection Officer is Ros Huggins

Introduction

1. This privacy statement informs you about how we process information that we record about you, whether provided by you, or by another person or organisation. It applies to information that could identify you as an individual ("personal information") and information that does not, including that which relates to your business. In the context of the law and this notice, "process" means collect, store, transfer, use or otherwise act on information.
2. We are committed to the protection of your privacy and confidentiality. We recognise that you are entitled to know that your data will not be used for any unintended purpose, and will not accidentally fall into the hands of a third party.
3. We undertake to preserve the confidentiality of all information you provide to us, and hope that you reciprocate.
4. We have in place procedures and training for data protection, confidentiality and information security. These are regularly reviewed to ensure that they remain effective.
5. Our policy complies with UK law accordingly implemented, including that required by the EU General Data Protection Regulation (GDPR).
6. The law requires us to tell you about your rights and our obligations to you in regards to the processing and control of your personal data. We do this now, by requesting that you read the information provided at www.knowyourprivacyrights.org
7. Except as set out below, we do not share, or sell, or disclose to a third party, any information collected from you or through our website.

8. Data we process

We provide a range of services to businesses and personal clients. We aim to process data, whether personal data or not, only to the extent necessary for us to provide our clients with our services and for other agreed purposes. Please see appendix 1 for a breakdown of information held, third party sharing and processing methods.

Often we may aggregate information in a general way and use it to provide class information. If we use it for this purpose, you as an individual will not be personally identifiable.

Personal clients

If you are a personal client, personal data that we may process may include contact information, information about your business activities, information about your family members, and financial information such as that relating to your income, expenses, taxation and investments.

In most cases, your personal data will have been provided to us by you. However, with your consent, or if it is necessary in order to provide you with our services, we may have obtained your personal data from a third party source.

Third parties connected to clients and suppliers

We may process your personal data if you have a personal or business connection with any of our clients or suppliers. For example, you may be a family member, business partner, other adviser, supplier or transaction counterparty.

The data we process may include contact information, information about business activities, information about partners, directors, employees, information relating to employment remuneration and payroll, and financial information such as that relating to income, expenses, taxation and investments.

We may be given your personal data by our clients or suppliers, or by third parties acting on the instructions of a client or a supplier.

We ask our clients and suppliers to bring this privacy notice to your attention as soon as they become aware that we process your personal data.

Suppliers

If you supply our business with goods or services, including subcontracted services that we supply to our clients, then we may process your personal information. However, we do so only to the extent necessary to contract with you.

In most cases, your personal data will have been provided to us by you. However, sometimes we use third parties such as credit rating agencies to make decisions regarding our relationship.

The bases on which we process personal information

The law requires us to determine under which of six defined bases we process different categories of your personal information, and to notify you of the basis for each category.

If a basis on which we process your personal information is no longer relevant then we shall immediately stop processing your data.

If the basis changes then if required by law we shall notify you of the change and of any new basis under which we have determined that we can continue to process your information.

9. Information we process because we have a contractual obligation

We may process personal information when a contract has been formed with our business and processing is necessary to carry out our obligations under that contract, or when processing personal data is necessary in order to form a contract.

We shall continue to process this information until the contract between us ends or is terminated by either party under the terms of the contract.

10. Information we process with your consent

Only when you have given us explicit permission to do so, do we process your personal information under the basis of consent.

For example, you might have agreed that we may pass your name and contact information to selected associates whom we consider may provide services or products you would find useful.

We continue to process your information on this basis until you withdraw your consent or it can be reasonably assumed that your consent no longer exists.

You may withdraw your consent at any time by instructing us ros@rabooks.co.uk or adrienne@rabooks.co.uk However, if you do so, you may not be able to use our services further.

11. Information we process for the purposes of legitimate interests

We may process information on the basis there is a legitimate interest, either to you or to us, of doing so.

Where we process your information on this basis, we do so only after having given careful consideration to:

- whether the same objective could be achieved through other means
- whether processing (or not processing) might cause you harm
- whether you would expect us to process your data, and whether you would consider it reasonable to do so

For example, we may process your data on this basis for the purposes of:

- record-keeping for the proper and necessary administration of our business
- responding to communication from you to which we believe you would expect a response
- protecting and asserting the legal rights of any party
- insuring against or obtaining professional advice that is required to manage business risk
- protecting your interests where we believe we have a duty to do so

12. Information we process because we have a legal obligation

Sometimes, we must process your information in order to comply with a statutory obligation.

For example, we may be required to give information to legal or tax authorities if they so request or if they have the proper authorisation such as a search warrant or court order.

This may include your personal information.

Specific uses of information you provide to us

13. Communicating with you

When you contact us, whether by telephone, through our website or by e-mail, we collect the data you have given to us in order to reply with the information you need.

We record your request and our reply in order to increase the efficiency of our business.

We keep personally identifiable information associated with your message, such as your name and email address so as to be able to track our communications with you to provide a high quality service.

14. Dealing with complaints

When we receive a complaint, we record all the information you have given to us.

We use that information to resolve your complaint.

If your complaint reasonably requires us to contact some other person, we may decide to give to that other person some of the information contained in your complaint. We do this as infrequently as possible, but it is a matter for our sole discretion as to whether we do give information, and if we do, what that information is.

If the complaint relates to information on our website and we feel it is justified or if we believe the law requires us to do so, we shall remove the information while we investigate.

If we think your complaint is without any basis, we shall not correspond with you about it.

We may compile statistics from information relating to complaints to assess the level of service we provide, but not in a way that could identify you or any other person.

15. Office visitors

We keep a record of your visit in order to maintain the security of our premises, your safety and the safety of other visitors.

We keep the record of your visit only for as long as necessary.

Use of information we collect through automated systems when you visit our website

16. Cookies

Our website DOES NOT use cookies.

17. Personal identifiers from your browsing activity

We DO NOT use personal identifiers from your browsing activity.

Disclosure and sharing of your information

18. Information we obtain from third parties

Although we do not disclose your personal information to any third party (except as set out in this notice), we sometimes receive data that is indirectly made up from your personal information from third parties whose services we use.

No such information is personally identifiable to you.

19. Data may be processed outside the European Union

Our websites are hosted in the European Union.

We may also use outsourced services in countries outside the European Union (EU) from time to time in other aspects of our business.

Accordingly data obtained within the UK or any other country could be processed outside the EU.

We use safeguards with respect to data transferred outside the EU.

Access to your own information

20. Access to your personal information

- 20.1. At any time you may review or update personally identifiable information that we hold about you.
- 20.2. To obtain a copy of any information you may send us a request at ros@rabooks.co.uk or adrienne@rabooks.co.uk
- 20.3. After receiving the request, we will provide the information within one calendar month of confirmation of receipt of your request. Should this not be possible for any reason an extension of up to an additional two calendar months may be necessary in which case you will be informed within the first calendar month from acknowledgement of request.

21. Removal of your information

If you wish us to remove personally identifiable information, you may contact us at ros@rabooks.co.uk or adrienne@rabooks.co.uk

This may limit the service we can provide to you.

22. Verification of your information

When we receive any request to access, edit or delete personal identifiable information we shall first take reasonable steps to verify your identity before granting you access or otherwise taking any action. This is important to safeguard your information.

23. Retention period for personal data

Except as otherwise mentioned in this privacy notice, we keep your personal information only for as long as required by us:

- 23.1. to provide you with the services you have requested;
- 23.2. to comply with other law, including for the period demanded by our tax authorities;
- 23.3. to support a claim or defence in court.

Other matters

24. If you are not happy with our privacy policy

- 24.1. If you are not happy with our privacy policy or if you have any complaint then you should contact us by email at ros@rabooks.co.uk or adrienne@rabooks.co.uk.
- 24.2. If a dispute is not settled then we hope you will agree to attempt to resolve it by engaging in good faith with us in a process of mediation or arbitration.
- 24.3. If you are in any way dissatisfied about how we process your personal information, you have a right to lodge a complaint with the Information Commissioner's Office. This can be done at <https://ico.org.uk/concerns/>

25. Compliance with the law

Our privacy policy has been compiled so as to comply with the law of every country or legal jurisdiction in which we aim to do business. If you think it fails to satisfy the law of your jurisdiction, we should like to hear from you.

26. Review of this privacy policy

We may update this privacy notice from time to time as necessary. The terms that apply to you are those posted here. We advise you to print a copy for your records.

If you have any question regarding our privacy policy, please contact us.

Appendix 1

R A Book Keeping

GDPR Information Processing

Service Provided	Information held (as applicable for the processes required)	Third party Sharing	Processing Method
Book Keeping	Business/Owner/Committee Trustees Name Address Telephone Number Email Date of Birth National Insurance Number Inland Revenue Identifiers Business Bank Details (as applicable) Customer Name Address Telephone Number Email Dates of birth (as applicable) Supplier Name Address Telephone Number Email	HMRC Charity Commission Client Specified Accountants AMLCC (Anti Money Laundering compliance Checks)	Freeagent Simply Books Excel Outlook AMLCC HMRC (Self assessment and VAT returns) Dropbox
Payroll	Business/Owner Name Address Telephone Number Email Inland Revenue Identifiers Pension Scheme Identifiers Employees Name Address Telephone Number Email Date of Birth National Insurance Number Pension Scheme Identifiers	HMRC Client Specified Accountants Pension Schemes	Moneysoft Payroll Software Outlook Excel
Administration	Business/Owner/Committee Trustees Name Address Telephone Number Email Any other information necessary to carryout our services as processors		Excel Word Outlook Dropbox Google docs

All data is securely backed up on offsite servers

WEF 25/5/2018 all personal data transmitted by email is done so in encrypted format and password protected