

PRIVACY NOTICE

WHO WE ARE

Stonehouse & Co. is the data controller for the purposes of UK data protection legislation.

If you have any questions regarding this Privacy Notice or your personal data, please contact:

Stonehouse & Co., The Innovation Centre, Vienna Court, Kirkleatham Business Park, Redcar, TS10 5SH

Telephone: 01642 989115

WHAT INFORMATION WE COLLECT

We may collect and process personal data including:

- names and contact details;
- dates of birth;
- tax references and identification numbers;
- financial and accounting records;
- payroll information;
- identity verification documents;
- correspondence and communications;
- information required to provide professional services.

We obtain information directly from you, your business, your authorised representatives, HMRC, Companies House, software providers, and other professional advisers.

WHY WE PROCESS YOUR DATA

We process personal data in order to:

- provide accountancy, taxation, payroll, bookkeeping, and advisory services;
- comply with legal and regulatory obligations;
- undertake anti-money laundering checks;
- communicate with HMRC and other authorities;
- manage our client relationship;
- maintain records;
- defend legal claims or complaints;
- invoice and recover fees.

LEGAL BASIS FOR PROCESSING

We process personal data under one or more of the following legal bases:

- performance of a contract;
- compliance with legal obligations;
- legitimate business interests;
- consent, where required.

Where you do not provide requested information, we may be unable to provide services.

WHO WE SHARE DATA WITH

We may share information with:

- HMRC and Companies House;

- banks and finance providers where authorised;
- payroll and cloud software providers;
- professional advisers and subcontractors;
- our insurers and legal advisers;
- regulatory or law enforcement bodies;
- other parties where required by law or authorised by you.

We use cloud-based systems including bookkeeping, payroll, document management, and engagement software.

INTERNATIONAL TRANSFERS

Some software providers may process data outside the United Kingdom.

Where this occurs, we take reasonable steps to ensure appropriate safeguards are in place in accordance with UK data protection law.

HOW LONG WE KEEP DATA

We generally retain records:

- for the duration of our relationship with you; and
- for up to seven years afterwards.

Longer retention periods may apply where required by law, regulation, or insurance requirements.

YOUR RIGHTS

Under UK GDPR, you may have rights including:

- access to your personal data;
- correction of inaccurate data;
- erasure of data in certain circumstances;
- restriction of processing;
- objection to processing;
- data portability;
- withdrawal of consent where processing is based on consent.

Requests should be made in writing to the contact details above.

AUTOMATED DECISION-MAKING

We do not use automated decision-making or profiling.

COMPLAINTS

If you are unhappy with how we handle your personal data, please contact us first.

You also have the right to complain to the Information Commissioner's Office:

<https://www.ico.org.uk>

UPDATES TO THIS PRIVACY NOTICE

We may update this Privacy Notice from time to time.

The latest version will always be available on our website.