

Privacy Policy

Your rights, your information and how we use it

robinson+co are committed to protecting your personal and business information.

Our Privacy Policy contains information about what details we collect, request and hold, what we do with this information, who we may share it with and why, and your rights regarding the information you have given us.

We may need to make changes to our Privacy Policy, so please check the robinson+co website for updates from time to time.

Who we are

We are robinson+co Chartered Accountants and Business Advisers and this Privacy Policy applies to the following:

- robinson+co Chartered Accountants and Business Advisers
- robinson+co (Gosforth) Limited
- robinson+co Financial Services Limited

How to contact us

If you have any questions regarding our Privacy Policy or the information we collect or use about you or your business, please contact:

The Data Protection Officer
robinson+co Chartered Accountants and Business Advisers
Oxford Chambers
New Oxford Street
WORKINGTON
CA14 2LR
Email: accountancy@robinsonco.co.uk

You also have the right to make a complaint to the Information Commissioner's Office (ICO), the UK supervisory authority for data protection issues, at any time. The ICO's contact details are as follows:

Information Commissioner's Office
Wycliffe House
Water Lane
WILMSLOW
SK9 5AF

Telephone 0303 123 1113 (local rate) or 01625 545 745
Website ico.org.uk/concerns

Information we collect and use

- Information about who you are e.g. your name, date of birth and contact details
- Information about your business e.g. bank statements, accounting records
- Information you receive from HM Revenue & Customs and/or information we directly receive as a result of being an agent of HMRC on your behalf
- Information about your contact with us e.g. meetings, phone calls and emails

- Information classed as 'sensitive' personal information e.g. relating to your health or marital status
- Information you may provide us about other people e.g. next of kin, business partners
- Information on children e.g. names and date of births when assessing tax implications

Where we collect your information

We may collect/obtain information directly from you, and from a variety of sources, including:

- Information obtained during first initial meeting and interview
- Information requested/handed in from you and your business e.g. accounting information, correspondence from HM Revenue & Customs, other business related documents,
- Phone conversations with us and emails
- Directly from HM Revenue & Customs where we act as your agent
- On-line searches e.g. Companies House website for yearend filing dates

Who we may share your information with

We may share your information between the different organisations within robinson+co Chartered Accountants and the following only when we have received specific agreement from you and your business:

- HM Revenue & Customs (when acting as agent)
- Companies House (when engaged to submit information on your behalf)
- Other third parties only when a specific request or authorisation is provided by you

Where your information is processed

All of your personal and business information is processed in the UK.

How we protect your information

We take information and system security very seriously and we strive to comply with our obligations at all times. Any information which is collected, recorded or used in any way, whether paper based, or electronic, will have appropriate safeguards applied in line with our data protection obligations.

How long we keep your information

We will keep your personal and business information only where it is necessary to provide you with the services we are engaged to complete on your behalf. We may also keep your information after this period to comply with our legal or regulatory obligations e.g. Company statutory records

Your individual rights

You have several rights in relation to how robinson+co uses your information. They are:

- Right to be informed. You have a right to receive clear and easy to understand information on what personal and business information we have, why and who we have it with – we do this in our Privacy Policy
- Right of access. You have the right of access to your personal and business information. If you wish to receive a copy of the personal information we hold on you, you may make a data subject access request (DSAR)
- Right to request that your personal information be rectified. If your personal or business information is inaccurate or incomplete, you can request that it is corrected
- Right to request erasure. You can ask for you information to be deleted or removed if there is not a compelling reason for robinson+co to continue to hold it

- Right to restrict processing. You can ask that we block or suppress the processing of your information. This means that we are still permitted to keep your information, but unable to use this in the future for those reasons you have restricted
- Right to data portability. You can ask for a copy of your personal and/or business information for your own purposes to use across different services. In certain circumstances, you may move, copy or transfer the information we hold to another company or organisation in a safe and secure way
- Right to object. You can object to [robinson+co](#) processing your information e.g. for direct marketing purposes
- Rights related to automatic decision making including profiling. You have the right to ask robinson+co to give you information about its processing of your personal data and challenge a decision where processing is done solely by an automated process