

Privacy Policy for Beancounters Accounting

Last updated: 13 July 2026

1. Introduction

Beancounters Accounting takes the privacy and security of your personal information seriously.

This privacy policy explains how we collect, use, store and protect your personal information when you:

- engage us to provide accounting, tax, payroll, bookkeeping or related professional services;
- make an enquiry about our services;
- visit or interact with our website;
- represent one of our clients, suppliers or professional contacts; or
- otherwise communicate or work with us.

We process personal information in accordance with applicable UK data protection legislation, including the UK General Data Protection Regulation, the Data Protection Act 2018 and any legislation that amends or replaces them.

2. Who We Are

Beancounters Accounting is an accountancy firm based in Malvern, England.

For data protection purposes, the data controller is:

Legal business name: The Beancounters Accounting Ltd

Trading name: Beancounters Accounting

Company number: 16807932

Registered or business address: Unit 8-12 Willow End Park Blackmore Park Road, Welland, Malvern, England, WR13 6NN

Email address: info@beancountersacc.com

Telephone number: 07502062903

If Beancounters Accounting operates through a limited company, the full registered company name and company registration number should be included above.

3. The Personal Information We Collect

The information we collect depends on the nature of our relationship with you and the services you ask us to provide.

We may collect and process the following types of personal information.

Identity and contact information

This may include:

- your name;
- date of birth;
- home or business address;
- email address;
- telephone number;
- signature;
- job title;
- company or business details; and
- details of directors, shareholders, partners, trustees and beneficial owners.

Identification and anti-money-laundering information

Where required for client identification, verification and regulatory purposes, we may collect:

- copies of passports or driving licences;
- proof of address;
- National Insurance numbers;
- Unique Taxpayer Reference numbers;
- company registration information;
- ownership and control information;
- information about politically exposed person status;
- sanctions-screening results;
- information about the source of funds or source of wealth; and
- other information required for customer due-diligence checks.

Financial, accounting and tax information

This may include:

- bank account details;
- accounting records;
- invoices, receipts and expenses;
- income and expenditure information;
- bank statements;
- tax calculations and tax returns;
- VAT records;
- payroll information;
- pension information;
- details of investments, assets, liabilities and transactions;
- business plans and forecasts; and
- information contained in correspondence with HM Revenue & Customs or other authorities.

Payroll and employment information

Where we provide payroll or related services, we may process information about our clients' employees, workers, directors or contractors, including:

- names and contact details;
- dates of birth;
- National Insurance numbers;
- tax codes;
- salary and payment information;
- bank details;
- working hours;
- pension contributions;
- student loan deductions;
- statutory payments;
- benefits and expenses;
- absence information; and
- information necessary to administer payroll and employment-related reporting.

Some payroll records may contain health information or other special-category personal information, for example where statutory sick pay or maternity-related payments are processed.

Website and technical information

When you visit our website, we may collect:

- your IP address;
- browser and device information;
- the pages you visit;
- the date and time of your visit;
- referral information;

- cookie identifiers; and
- information submitted through website forms.

More information about cookies should be provided in our separate Cookie Policy.

Communications

We may retain information contained in:

- emails;
- telephone conversations and notes;
- letters;
- online enquiry forms;
- meeting notes; and
- other correspondence with you.

4. How We Collect Your Information

We may collect personal information:

- directly from you;
- from a business, employer or organisation that has asked us to provide services;
- from another individual connected with a client, such as a director, employee, shareholder, partner or family member;
- from HM Revenue & Customs, Companies House and other public authorities;
- from banks, pension providers, legal advisers and other professional advisers;
- from accounting, payroll and bookkeeping software;
- from identity-verification, credit-reference, sanctions-screening or anti-money-laundering service providers;
- from publicly available sources, including public registers and websites;
- through referrals and professional contacts; and
- through your use of our website.

Where you provide personal information about another person, you should make sure that you are permitted to provide it to us and, where appropriate, that the person has been informed about this privacy policy.

5. How We Use Your Information

We may use personal information to:

- respond to enquiries and provide quotations;
- carry out client acceptance and conflict checks;
- verify identities and complete anti-money-laundering checks;

- provide bookkeeping, accounting, payroll, VAT, tax and related services;
- prepare accounts, tax returns and statutory filings;
- communicate with HM Revenue & Customs, Companies House and other authorities where authorised or required;
- operate payroll and pension processes;
- provide professional advice and support;
- communicate with clients and manage our professional relationships;
- issue invoices, collect payments and manage debts;
- maintain accurate business and regulatory records;
- comply with legal, tax, regulatory and professional obligations;
- prevent and detect fraud, money laundering and other unlawful activity;
- establish, exercise or defend legal claims;
- manage complaints and professional-indemnity matters;
- secure and improve our website, systems and services;
- manage suppliers and professional contacts; and
- provide relevant updates about our services, subject to your marketing preferences.

6. Our Lawful Bases for Processing

We must have a lawful reason for processing personal information. Depending on the circumstances, we may rely on one or more of the following lawful bases.

Performance of a contract

We process information where it is necessary to:

- take steps at your request before entering into an engagement;
- provide the services set out in our engagement letter; or
- meet our obligations under a contract with you.

Legal obligation

We process information where necessary to comply with legal or regulatory duties, including obligations relating to:

- taxation;
- accounting records;
- anti-money-laundering and counter-terrorist-financing requirements;
- fraud prevention;
- court orders;
- regulatory enquiries; and
- reporting to public authorities.

Legitimate interests

We may process information where it is necessary for our legitimate business interests, provided that those interests are not overridden by your rights and interests.

These interests may include:

- managing and developing our business;
- maintaining client and professional relationships;
- protecting our systems and information;
- preventing fraud;
- recovering unpaid fees;
- improving our services and website;
- keeping appropriate professional records; and
- establishing or defending legal claims.

Consent

In limited circumstances, we may rely on your consent, for example for certain types of electronic marketing or non-essential website cookies.

Where we rely on consent, you may withdraw it at any time. Withdrawing consent will not affect processing that took place before it was withdrawn.

7. Special-Category and Criminal-Offence Information

We will only process special-category information, such as health information, or information relating to criminal offences where this is necessary and permitted by law.

Depending on the circumstances, this may be necessary for:

- payroll and employment-related obligations;
- preventing or detecting unlawful acts, fraud or dishonesty;
- regulatory and anti-money-laundering compliance;
- establishing, exercising or defending legal claims; or
- circumstances where you have provided explicit consent.

We will apply additional safeguards where required.

8. Who We Share Your Information With

We may share personal information with trusted organisations where this is necessary to provide our services, operate our business or comply with our obligations.

Recipients may include:

- HM Revenue & Customs;
- Companies House;
- pension providers;
- banks and payment-service providers;
- accounting, bookkeeping, payroll and tax-software providers;
- cloud-storage, email, document-management and IT-support providers;
- identity-verification and anti-money-laundering service providers;
- professional bodies and supervisory authorities;
- our professional-indemnity insurers;
- auditors, solicitors and other professional advisers;
- subcontractors and consultants assisting us with your work;
- courts, law-enforcement agencies and public authorities;
- debt-recovery providers; and
- a prospective purchaser, investor or successor in connection with a business sale or restructuring.

Where another professional adviser is involved in your affairs, we will normally only share information with them where you have authorised us to do so or where sharing is otherwise permitted or required by law.

We will not sell or rent your personal information to third parties. We will not provide your information to third parties for their own marketing purposes without an appropriate lawful basis.

9. Service Providers Working on Our Behalf

We use third-party service providers to help operate our business and deliver services.

Where a service provider acts as a data processor on our behalf, we require it to:

- process information only for agreed purposes;
- follow our documented instructions;
- maintain appropriate confidentiality and security;
- assist us in meeting our data protection obligations; and
- delete or return information when the service ends, where required.

We only provide service providers with the information reasonably necessary for them to perform their services.

10. International Transfers

Some of the software and service providers we use may store information outside the United Kingdom or allow it to be accessed from another country.

Where personal information is transferred outside the United Kingdom, we will take appropriate steps to protect it. Depending on the destination and recipient, these steps may include:

- transferring information to a country recognised by the UK government as providing an adequate level of protection;
- using an approved international data-transfer agreement or contractual addendum;
- completing appropriate transfer-risk assessments; or
- relying on another transfer mechanism permitted by UK data protection law.

You may contact us for further information about the safeguards used for international transfers relevant to your information.

11. How We Protect Your Information

We use appropriate technical and organisational measures designed to protect personal information from:

- unauthorised access;
- accidental or unlawful loss;
- misuse;
- alteration;
- disclosure; and
- destruction.

Our measures may include access restrictions, password controls, multi-factor authentication, encryption, secure backups, staff confidentiality requirements, security monitoring and staff training.

Access to personal information is restricted to people who need it for legitimate business or professional purposes.

Although we take reasonable precautions, no method of electronic transmission or storage can be guaranteed to be completely secure. You are responsible for keeping passwords and account-access information confidential.

12. How Long We Keep Your Information

We retain personal information only for as long as it is reasonably required for the purpose for which it was collected and to meet our legal, tax, regulatory, insurance and professional obligations.

Our retention periods depend on the type of information and the circumstances.

Generally:

- client accounting, tax and engagement records will normally be retained for at least six years after the end of the relevant accounting period or engagement;
- anti-money-laundering identification and customer due-diligence records will normally be retained for five years after the end of the business relationship or completion of an occasional transaction;
- enquiry and prospective-client information may be retained for up to two years after the last meaningful contact;
- records required for legal claims, regulatory enquiries or insurance purposes may be retained for longer;
- marketing information may be retained until you unsubscribe, object or the information is no longer required; and
- website information will be retained in accordance with our Cookie Policy and the retention settings of the relevant website services.

When information is no longer required, we will securely delete, destroy or anonymise it, unless we are legally permitted or required to retain it.

13. Marketing Communications

We may occasionally send existing clients and professional contacts information about:

- changes to tax or accounting requirements;
- important regulatory developments;
- our services; and
- information we reasonably believe may be relevant to their business or financial affairs.

You may ask us to stop sending marketing communications at any time by using the unsubscribe option provided or by contacting us.

Opting out of marketing will not prevent us from sending communications that are necessary to provide our services or manage our professional relationship with you.

14. Cookies and Website Analytics

Our website may use cookies and similar technologies to:

- operate essential website functions;
- remember visitor preferences;
- protect the website from misuse;
- understand how visitors use the website; and
- improve website performance.

Where required, we will ask for consent before placing non-essential cookies on your device.

Please refer to our separate Cookie Policy for details of the cookies and analytics services used on our website and how you can manage your preferences.

15. Your Data Protection Rights

Depending on the circumstances, you may have the right to:

Request access

You may request confirmation that we process your personal information and ask for a copy of the information we hold about you.

Request correction

You may ask us to correct personal information that is inaccurate or complete information that is incomplete.

Request deletion

You may ask us to delete your personal information in certain circumstances. This right is not absolute, and we may need to retain information to comply with legal, regulatory or professional obligations.

Request restriction

You may ask us to restrict how we use your information in certain circumstances, for example while the accuracy of the information is being checked.

Object to processing

You may object to processing based on our legitimate interests. We will consider your objection and stop processing unless we have compelling legitimate grounds to continue or the information is required for legal claims.

You have an absolute right to object to the use of your personal information for direct marketing.

Request data portability

Where applicable, you may request certain information you provided to us in a structured, commonly used and machine-readable format or ask us to transfer it to another organisation.

Withdraw consent

Where processing is based on consent, you may withdraw your consent at any time.

Rights relating to automated decisions

You may have rights where a decision with significant effects is made solely through automated processing. We do not ordinarily make decisions about clients using solely automated processes.

Some rights are subject to conditions and legal exemptions. We may need to request identification before responding to a request.

To exercise your rights, please contact us using the details in Section 2.

16. Accuracy of Your Information

It is important that the personal information we hold is accurate and up to date.

Please inform us if your name, address, contact details, business circumstances or other relevant information changes during your relationship with us.

17. Third-Party Websites

Our website may contain links to websites operated by other organisations.

We are not responsible for the privacy practices, security or content of third-party websites. You should review the privacy policy of each external website you visit.

18. Children's Information

Our website and services are not directed at children.

We may occasionally process information relating to children where it is necessary to provide accounting, payroll, tax or related services to a client. In those circumstances, we will only process the information where there is an appropriate lawful basis and will take additional care to protect it.

19. Changes to This Privacy Policy

We keep this privacy policy under review and may update it to reflect:

- changes to our services;
- changes to the software or providers we use;
- changes to our business practices; or
- changes to legal or regulatory requirements.

The latest version will be published on our website. The date at the top of the policy shows when it was last updated.

20. Questions and Complaints

Please contact us first if you have any questions or concerns about how we use your personal information. We will try to resolve your concerns directly.

Beancounters Accounting

Unit 8-12 Willow End Park Blackmore Park Road,
Welland, Malvern, England,
WR13 6NN
info@beancountersacc.com
07502062903

You also have the right to complain to the Information Commissioner's Office, the UK's independent data protection regulator.

Information Commissioner's Office

Wycliffe House
Water Lane
Wilmslow
Cheshire
SK9 5AF

Telephone: 0303 123 1113

Further information and the ICO's complaints service are available through the Information Commissioner's Office website.