



Accounting Genie – Terms of Business

1. About Us

Accounting Genie is the trading name of Miss Eugenie Houlder BA FCA, Chartered Accountant, regulated by the Institute of Chartered Accountants in England and Wales (ICAEW).

2. Applicable Law

These terms, and all engagement contracts with clients, are governed by the laws of England and Wales. Any disputes will be dealt with by the courts of England and Wales.

3. Our Responsibilities

We will provide our services with reasonable care and skill.

We will comply with ICAEW's Code of Ethics and all applicable professional standards.

We will keep your affairs confidential except where disclosure is required by law or regulation.

4. Your Responsibilities

You must provide us with complete, accurate and timely information to allow us to do our work.

You remain legally responsible for your own tax affairs, including filing obligations and payments to HMRC.

You agree to respond promptly to our queries so that we can meet deadlines.

5. Fees and Payment

Our fees are set out in the written quote you receive.

Fees are payable within 14 days of invoice unless agreed otherwise.

We reserve the right to charge interest on overdue invoices at 8% above the Bank of England base rate under the Late Payment of Commercial Debts (Interest) Act 1998.

Additional charges may apply if information is late, incomplete, or requires correction.

6. Limitation of Liability

Our liability to you for any claim in contract, tort, negligence or otherwise will be limited to the amount of our professional indemnity insurance in place at the time.

We will not be liable for any penalties, interest or additional tax arising from errors or delays caused by you providing incomplete, incorrect or late information.

7. Data Protection

We are registered as a Data Controller under UK GDPR.

We process personal data in line with our Privacy Notice (available on our website).

By engaging our services, you consent to us processing your data for the purposes of providing accountancy and tax services.

8. Confidentiality

We will not disclose your information to third parties without your consent, unless required by law or regulation.

We may use subcontractors or cloud-based services where necessary, but they will be bound by the same confidentiality requirements.

9. Conflicts of Interest

If a conflict of interest arises, we will notify you promptly and agree how to manage it. If it cannot be resolved, we may have to decline or withdraw from acting.

10. Professional Rules and Standards

We are subject to ICAEW's Bye-laws, regulations and Code of Ethics, including Professional Conduct in Relation to Taxation.

These can be found on ICAEW's website: <https://www.icaew.com/regulations>.

11. Complaints

We aim to provide a high-quality service. If you are unhappy, please follow our Complaints Procedure (available on our website).

You may also have the right to complain to ICAEW or, in certain cases, to the Legal Ombudsman.

12. Termination

Either party may end the engagement with written notice.

You remain responsible for any fees due up to the termination date.

We may terminate immediately if you fail to cooperate, provide false/misleading information, or fail to pay fees.

13. Retention of Papers

We will return original documents to you on request.

We may destroy electronic and paper records after 7 years unless you instruct us otherwise.

14. Third Party Rights

Our services are provided solely for you.

No third party is entitled to rely on our work without our prior written consent.

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