



Accounting Genie – Privacy notice

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).

We are the “data controller” of the personal information you provide to us. This means we decide how and why your data is used.

2. What Information We Collect

We may collect and use the following personal data:

- Contact details (name, address, telephone, email).
- Identification details (date of birth, NI number, UTR, tax references).
- Financial information needed for your accounts and tax returns.
- Copies of documents you provide (e.g. ID for anti-money laundering checks).
- Information about your business, property, or employment if relevant to the services we provide.

3. How We Use Your Information

We use your data to:

- Provide accountancy and tax services.
- Communicate with you about your affairs.
- Meet our legal and regulatory obligations (e.g. HMRC, ICAEW, anti-money laundering).
- Maintain client records, billing, and administration.

We will not use your data for unrelated purposes without your consent.

4. Lawful Bases for Processing

We rely on the following lawful bases under UK GDPR:

- Contract – to deliver the services you engage us to provide.
- Legal obligation – to meet requirements from HMRC, ICAEW, or anti-money laundering regulations.
- Legitimate interests – to run our practice efficiently, manage client relationships, and improve our services.
- Consent – if you sign up for optional updates or marketing communications (you can withdraw consent at any time).

5. Sharing Your Information

We only share your data when necessary, for example:

- HMRC, Companies House, or other authorities where required by law.
- ICAEW or other regulators for compliance monitoring.
- Subcontractors or software providers (e.g. cloud accounting platforms) who help deliver our services, under strict confidentiality agreements.

- Professional advisers such as insurers or legal advisers if needed.

We do not sell your data to third parties.

6. International Transfers

We aim to keep your data in the UK. If we use software or services where data may be stored outside the UK, we ensure that appropriate safeguards (such as adequacy decisions or standard contractual clauses) are in place.

7. How Long We Keep Your Data

We keep your personal data only as long as necessary. Typically, this is seven years after the end of our relationship, in line with tax and regulatory rules. After this period, data is securely deleted or destroyed.

8. Your Rights

You have the right to:

- Access the personal data we hold about you.
- Request corrections if your data is inaccurate.
- Ask for your data to be deleted (in certain circumstances).
- Object to how we use your data or request we restrict its use.
- Ask us to transfer your data to another provider (data portability).

To exercise your rights, please contact us (details below).

9. How We Protect Your Data

We take appropriate technical and organisational measures to keep your data safe, including encryption, secure passwords, and limiting access to authorised staff only.

10. Contact Us

If you have any questions about this notice or how we handle your data, please contact:
Miss Eugenie Houlder BA FCA, via the Contact page, or by other means if you have them.

11. Complaints

You also have the right to complain to the Information Commissioner's Office (ICO), the UK regulator for data protection:

Information Commissioner's Office

Wycliffe House, Water Lane, Wilmslow, Cheshire, SK9 5AF

Tel: 0303 123 1113

Website: www.ico.org.uk

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