



PRIVACY NOTICE

Oak Leaf Accountancy Limited

1. Purpose of This Notice

This notice describes how we collect and use personal data about you, in accordance with the UK General Data Protection Regulation (UK GDPR), the Data Protection Act 2018 and any applicable UK data protection legislation. Please read this notice carefully to understand our practices regarding your personal data and how we will treat it.

2. About Us

Oak Leaf Accountancy Limited is an ICAEW member firm providing accountancy, tax, and consultancy services. We are registered in England and Wales under company number 8256509 and our registered office is at 78 Stickleback Road, Calne, Wiltshire, SN11 9RB.

For the purpose of data protection legislation, we are the data controller. This means that we are responsible for deciding how we hold and use personal data about you. We are required under data protection legislation to notify you of the information contained in this notice.

We have appointed a Data Protection Point of Contact, who is responsible for assisting with enquiries in relation to this notice or our treatment of your personal data. If you have any questions, please refer to the contact details set out in the final section of this notice.

3. How We May Collect Your Personal Data

We may collect personal data about you when:

- You request a proposal from us for the services we provide.
- You or your employer engages us to provide services and during the course of providing those services.
- You contact us by email, telephone, post, or social media.
- We receive information from third parties or publicly available sources, such as Companies House, HMRC, or your employer.

4. The Kind of Information We Hold About You

We may hold the following categories of personal data:

- Your personal details (name, address, contact details, date of birth).
- Details of your communications with us.
- Details of any services you have received from us.
- Financial and taxation information necessary for us to deliver our services.
- Information received from other sources, such as your employer or publicly available data.
- Special category data, where relevant, for example health data or data revealing trade union membership (e.g. for payroll services).

5. How We Use Personal Data

We may process your personal data for the following lawful bases:

- Contractual obligation – to perform our obligations under an engagement letter or other contract.
- Legal obligation – to comply with professional, tax, and legal requirements.
- Legitimate interests – to manage and improve our business operations, maintain service quality, develop our services and communicate effectively with our clients.
- Consent – where you have provided consent, for example to receive marketing updates.

We will only process personal data for the purpose for which it was collected unless we reasonably consider that we need to use it for another reason that is compatible with the original purpose. If we need to use your personal data for an unrelated purpose, we will notify you and explain the legal basis for doing so.

6. Data Sharing

We may share your personal data with third parties where required by law, where necessary to fulfil our contractual obligations, or where we have a legitimate business interest. Third parties may include:

- Professional advisers, regulators, and legal authorities.
- IT and cloud service providers, professional indemnity insurers, and administrative service providers.
- Other entities within the Oak Leaf group of companies (where relevant).

All third-party service providers are required to implement appropriate security measures and may only process your personal data on our instructions.

We use carefully selected software providers to support the delivery of our services, including accounting software, document management systems, cloud hosting providers and approved artificial intelligence platforms. Where these providers process personal data on our behalf, they do so under appropriate contractual arrangements and are required to implement suitable technical and organisational security measures.

7. Use of Artificial Intelligence

We use artificial intelligence (AI) tools to assist with tasks such as research, document preparation and administrative work. Where the use of these tools involves the processing of personal data, we remain the data controller and the AI provider acts only as a data processor, processing data solely on our instructions under a written data processing agreement. We only use AI tools from providers who have entered into an appropriate data processing agreement with us, and we take steps to minimise the personal data used in this way wherever practical. Any output produced with the assistance of AI is reviewed by a member of our staff before it is relied upon or issued to you.

AI is used solely as an assistive technology and does not replace the professional judgement of our qualified staff.

The use of AI does not alter our professional responsibilities to you. We remain fully responsible for all advice and services we provide.

8. Transferring Personal Data Outside the UK

Some of our approved technology providers, including providers of artificial intelligence services, may process personal data outside the United Kingdom, including in the United States. Where this occurs, we ensure that appropriate contractual safeguards are in place, including the UK International Data Transfer Agreement (IDTA), the UK Addendum to the EU Standard Contractual Clauses or other lawful transfer mechanisms, as applicable.

9. Data Security

We have implemented appropriate technical and organisational security measures to prevent personal data from being accidentally lost, used, or accessed in an unauthorised way. Access to your data is limited to

employees and third parties who have a legitimate business need to know. They will only process your personal data on our instructions and are subject to a duty of confidentiality.

We have procedures in place to deal with any suspected data security breaches and will notify you and the Information Commissioner's Office (ICO) where we are legally required to do so.

10. Data Retention

We will retain your personal data for as long as necessary to fulfil the purposes for which it was collected, including for the purposes of satisfying any legal, accounting, or reporting requirements. Our retention periods are determined in line with ICAEW regulations, professional indemnity requirements, and applicable law.

Our detailed data retention schedule is available on request.

11. Your Rights

You have rights under data protection law to:

- Request access to your personal data.
- Request correction of any inaccurate or incomplete data.
- Request erasure of your personal data in certain circumstances.
- Object to processing based on legitimate interests.
- Request restriction of processing in certain cases.
- Request the transfer of your personal data to another controller.

If you wish to exercise any of these rights, please contact our Data Protection Point of Contact at bjackson@oakleafaccountancy.co.uk. You will not have to pay a fee to exercise your rights unless your request is manifestly unfounded or excessive.

12. Right to Withdraw Consent

Where you have provided consent for specific processing, you have the right to withdraw that consent at any time. To withdraw consent, please email bjackson@oakleafaccountancy.co.uk. Once we have received notification that you have withdrawn consent, we will cease processing your personal data for that purpose unless we have another lawful basis for doing so.

13. Changes to This Notice

We may update this privacy notice from time to time. The most current version will always be available on our website at www.oakleafaccountancy.co.uk.

14. Contact Us

If you have any questions about this notice or the way we handle your personal data, please contact:

Mr Barry Jackson – Data Protection Point of Contact

Email: bjackson@oakleafaccountancy.co.uk

You also have the right to make a complaint to the Information Commissioner's Office (ICO):

Information Commissioner's Office

Wycliffe House

Water Lane

Wilmslow

Cheshire SK9 5AF

Telephone: 0303 123 1113

Website: <https://ico.org.uk/concerns>