

## Privacy Policy PDF

Last updated: 24 August 2025

Ledger and Leaf is committed to protecting the privacy and confidentiality of our clients' information. This Privacy Policy explains how we collect, use, store, and protect personal data when you use our bookkeeping services.

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### 1. Information We Collect

We may collect the following types of information:

- Personal identification details – such as name, address, email, phone number.
  - Financial information – bank statements, invoices, receipts, payroll records, tax information, and other accounting data necessary to provide bookkeeping services.
  - Business information – company name, registration details, VAT numbers, and related financial documents.
  - Technical data – IP address, browser type, and cookies when you use our website.
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### 2. How We Use Your Information

We process your data for the following purposes:

- To provide bookkeeping and related financial services.
  - To prepare reports, accounts, and tax returns as instructed.
  - To communicate with you regarding services, updates, or queries.
  - To comply with legal and regulatory obligations (e.g., HMRC requirements).
  - To improve our services and ensure website functionality.
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### 3. Legal Basis for Processing (GDPR Compliance)

If you are based in the UK/EU, we rely on the following lawful bases under GDPR:

- Contractual necessity – processing your data to perform bookkeeping services.
  - Legal obligation – compliance with HMRC, tax, and accounting laws.
  - Legitimate interests – to run and improve our business.
  - Consent – when you explicitly agree (e.g., to receive newsletters or marketing).
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#### 4. Data Sharing and Disclosure

We do not sell or rent your data. We may share information only with:

- HMRC or other regulators, when legally required.
  - Trusted third-party service providers (e.g., accounting software, secure cloud storage, IT support) under strict confidentiality agreements.
  - Professional advisers (e.g., accountants, auditors, legal consultants).
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#### 5. Data Retention

We retain client records for at least 6 years after the end of the relevant financial year, in line with HMRC and legal obligations, unless a longer retention period is required. After this period, data will be securely deleted or anonymised.

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#### 6. Data Security

We use appropriate technical and organisational measures to protect your information, including:

- Encrypted storage and secure backups.
  - Password-protected systems and limited staff access.
  - Regular monitoring for unauthorised access or breaches.
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#### 7. Your Data Protection Rights

Under data protection law (GDPR), you have the right to:

- Access the personal data we hold about you.
- Request correction of inaccurate information.
- Request deletion of your data (subject to legal obligations).
- Restrict or object to processing in certain circumstances.
- Data portability – request a copy of your data in a structured format.
- Withdraw consent (where processing is based on consent).

You may exercise these rights by contacting us (see Section 10).

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## 8. Cookies and Website Tracking

Our website may use cookies to improve functionality and user experience. You can manage or disable cookies in your browser settings.

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## 9. International Transfers

If we transfer personal data outside the UK/EU, we will ensure it is protected by appropriate safeguards (such as Standard Contractual Clauses).

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## 10. Contact Us

If you have any questions about this Privacy Policy or wish to exercise your rights, please contact:

Ledger and Leaf

11 Melody Drive

Sileby

Loughborough

LE12 7UU

[jo@ledgerandleaf.co.uk](mailto:jo@ledgerandleaf.co.uk)

07906072757

If you are based in the UK/EU, you also have the right to lodge a complaint with the Information Commissioner's Office (ICO) at [www.ico.org.uk](http://www.ico.org.uk).