AdminRescue Limited

PRIVACY NOTICE

SHORT FORM

AdminRescue Limited (company number 6215141, ICO registration ZA081258) is the data controller. Jon Sharpe is responsible for data protection and can be contacted at contact@adminrescue.co.uk or on 01566 457166.

From you, your employer or other advisers, HMRC, Companies House, and, for identity checks, the electoral register, credit reference agencies, local authorities and Xama Technologies.

To set up and manage our relationship with you, provide our services, carry out the checks the law requires, meet our professional obligations and comply with the law, which may include informing HMRC, the police and others.

On secure systems including cloud-based software such as Client Engager, Microsoft 365, Xero, QuickBooks, FreeAgent, Sage, IRIS Elements, TaxCalc, AccountsSmarter and BrightPay. Some services may be outside the UK, and we put in place all the protections the law requires.

We use Microsoft Copilot and Claude (Anthropic) to help with drafting and organising work. A person always reviews the output, and your data is not used to train AI models.

HMRC, Companies House and other regulators, our software and service providers, insurers, our professional body and its supervisors, and local and national authorities where the law requires.

For as long as we have a relationship with you plus 7 years, unless there is a reason to keep it longer.

You can ask to see, correct, restrict, object to, delete or move your data, and withdraw consent, by contacting us. You can also complain to the ICO.

We do not use automated decision-making or profiling.

LONG FORM

Who we are

AdminRescue Limited ("AdminRescue", "we", "us") is a bookkeeping and accountancy practice registered in England, company number 6215141. Our registered office is Higher North Beer Farmhouse, Boyton, Launceston, Cornwall PL15 8NP.

We are the data controller for the personal information described in this policy, and we are registered with the Information Commissioner's Office (ICO), registration number ZA081258.

If you have any questions about this policy or how we use your information, contact Jon Sharpe, who is responsible for data protection at AdminRescue, by email at contact@adminrescue.co.uk, by phone on 01566 457166, or by post to the address above.

Who this policy applies to

This policy explains how we collect and use personal information about:

- our clients, including sole traders, partners, company directors, shareholders, trustees and individuals we prepare tax returns for
- people connected to our clients, such as their employees, customers, suppliers, tenants and family members, whose details appear in the records we work on
- people who contact us about our services, and visitors to this website.

The information we collect

Depending on the work we do for you, we may collect:

- **Identity and contact details:** name, address, email address, phone number, date of birth.

- **Identity documents:** copies of passports, driving licences and proof of address, which we must check under anti-money-laundering law.
- **Tax and official identifiers:** National Insurance number, Unique Taxpayer Reference (UTR), VAT number, PAYE reference, Companies House authentication code and company details.
- **Financial information:** bank statements, income, expenses, invoices, receipts, pension and investment details, property and rental information, and other records needed to prepare your accounts and returns.
- **Payroll information about your employees:** pay, tax codes, pension contributions, bank details, and in some cases information about sickness, maternity or paternity leave.
- **Communications:** emails, letters, call notes and messages sent through our client portal.
- **Website information:** we do not use contact forms, analytics or tracking. See "Cookies and this website" below.

Most of this information comes from you. We may also receive it from HMRC, Companies House, your bank or software feeds you have authorised, your previous accountant, your employer or its advisers, and, for identity checks, the electoral register, credit reference agencies, local authorities and Xama Technologies.

Why we use your information and our lawful basis

Data protection law requires us to have a lawful basis for each way we use personal information. We rely on:

- **Steps before a contract:** to answer your enquiry and take steps you ask for before we agree to act for you.
- **Performing our contract with you:** to provide bookkeeping, payroll, VAT, Self Assessment, accounts, Corporation Tax and other services you have engaged us for, and to communicate with you about them.
- **Legal obligation:** to meet our professional obligations as members of the Institute of Certified Bookkeepers, to carry out anti-money-laundering checks under the Money Laundering, Terrorist Financing and Transfer of Funds (Information on the Payer) Regulations 2017, to keep records required by law, to submit returns to HMRC and Companies House, and to report suspicious activity where the law requires it.
- **Legitimate interests:** to run and protect our practice, keep proper business records, send invoices and resolve fee disputes, deal with complaints and legal claims, and tell existing clients about deadlines and changes that may affect them. We only do this where it does not override your rights.
- **Consent:** where we ask for it, for example before sending general newsletters. You can withdraw consent at any time.

Where we process sensitive information such as health details for statutory sick, maternity or paternity pay, we do so because it is needed to meet employment and social security law obligations.

Anti-money-laundering checks

As a bookkeeping practice we are supervised for anti-money-laundering purposes by the Institute of Certified Bookkeepers, which is itself overseen by the Office for Professional Body Anti-Money Laundering Supervision (OPBAS). The law requires us to confirm the identity of our clients, and of the beneficial owners of client businesses, before we act and from time to time afterwards. We use an electronic identity verification service, Xama Technologies, for this, which may leave a record on your credit file that does not affect your credit score.

We use the information collected for these checks only to prevent money laundering and terrorist financing, unless another use is permitted by law or you have agreed to it.

When we act on your behalf

When we run payroll or keep books for your business, the records often include personal information about your employees, customers and suppliers. For that information your business is the data controller and we act as your data processor, following your instructions and the terms of our engagement letter. When our contract ends we delete or return this information within 3 years, unless the law requires us to keep it longer.

Who we share your information with

We never sell your personal information. We share it only where needed to provide our services, or where the law requires it, with:

- **HMRC** and **Companies House**, when we file returns, accounts and other submissions for you.
- **The Charity Commission** and the **Regulator of Community Interest Companies**, for charity and CIC clients.
- **Cloud accounting, tax and payroll software** that you or we use for your records: Xero, QuickBooks (Intuit), FreeAgent, Sage, IRIS Elements Tax & Accounts, TaxCalc, AccountsSmarter and BrightPay.
- **Our secure client portal**, Client Engager Online, which we use to exchange documents with you and deliver part of our services.

- **Our IT and communication providers**, including Microsoft Office 365 and Outlook for email and documents, and IONOS, which hosts this website.
- **AI assistants**: Microsoft Copilot and Anthropic (Claude). See "Artificial intelligence (AI) tools" below.
- **Xama Technologies**, our identity verification service for anti-money-laundering checks.
- **Pension providers**, for payroll clients with workplace pension schemes.
- **The Institute of Certified Bookkeepers**, our professional body, and **OPBAS**, which may review our files as part of their quality and anti-money-laundering monitoring.
- **Subcontractors** who help us deliver our services, under contracts that protect your information.
- **Your spouse or partner, your employer or your other advisers**, only where you have asked or allowed us to.
- **Someone appointed to act for you**, such as an attorney or executor, if you become incapacitated or die.
- **Tax investigation insurance providers**, where you have this cover through us.
- **Our professional indemnity insurers and advisers**, if needed to deal with a claim.
- **The police, courts, the ICO and other law enforcement agencies**, including the National Crime Agency, where the law allows or requires it.

Our suppliers may only use your information to provide their services to us, and must keep it secure.

Transfers outside the UK

We mainly use servers in the UK and the European Economic Area. Some of the software providers we use may store data elsewhere, for example in the European Economic Area, the United States or Australia. Where this happens we make sure the transfer is protected, for example because the country has been found by the UK government to provide adequate protection, or because the provider has signed the UK International Data Transfer Agreement or the UK Addendum to the EU standard contractual clauses.

Artificial intelligence (AI) tools

We use two AI assistants to help us work efficiently: **Microsoft Copilot**, as part of Microsoft 365, and **Claude**, made by Anthropic. We use them for tasks such as drafting letters and emails, summarising documents, checking and organising information, and preparing working papers.

- **A person always checks the work.** AI tools never make decisions about you on their own. Everything they produce is reviewed by a member of our team before it is used or sent, and we remain responsible for it.
- **Only what is needed.** We only give these tools the information needed for the task, and we avoid entering identity documents, bank details or other sensitive information unless it is essential.
- **Your data is not used to train AI models.** We use Claude through a Claude Pro subscription with the "Help improve Claude" setting turned off, so Anthropic does not use our conversations to train its models. We use Microsoft Copilot through our Microsoft 365 Business subscription, under which Microsoft acts as our data processor and does not use our data to train its AI models.
- **Where it is processed.** Microsoft processes Copilot data within its Microsoft 365 services, using data centres in the UK and EU where available. Anthropic may process data in the United States. Any transfer outside the UK is protected as described in "Transfers outside the UK" above.
- **Retention.** Our AI conversations are kept in our own password-protected accounts with Microsoft and Anthropic, in the same way as our emails, and are held under each provider's terms and privacy policy. Because they may contain client information, we treat them with the same care as the rest of your records.

The lawful basis for this use is our legitimate interest in running our practice efficiently, or performing our contract with you. If you would prefer us not to use AI tools on your work, tell us and we will respect that.

How long we keep your information

- **Client records, including anti-money-laundering checks and correspondence:** for as long as we act for you, plus 7 years after our business relationship ends.
- **Tax returns:** 7 years from the end of the tax year they relate to.
- **One-off advisory work:** 7 years from the date the work ended.
- **Information we process for your business as a data processor:** deleted or returned within 3 years of our contract ending.
- **Enquiries from people who do not become clients:** up to 12 months.

We may keep information longer if you ask us to or if there is a legal reason, such as an ongoing claim or investigation. After these periods we securely delete or destroy the information. Original documents belonging to you are returned to you.

How we keep your information secure

We use secure, password-protected systems with two-step login, encrypted cloud software and a secure client portal for sharing documents. Paper records are kept locked away. Access is limited to the people who need it to do their work, and our suppliers must protect your information to the same standard.

If a data breach is likely to put your rights at risk, we will tell you and the ICO as the law requires.

Your rights

You have the right to:

- **access** the personal information we hold about you (a "subject access request")
- ask us to **correct** information that is wrong or incomplete
- ask us to **delete** your information, where we no longer need to keep it
- ask us to **restrict** how we use your information
- **object** to us using your information on the basis of legitimate interests, including for direct marketing
- ask for your information in a **portable** format, where we process it by automated means under contract or consent
- **withdraw consent** at any time, where we rely on consent.

Some rights are limited where we must keep information by law, for example for anti-money-laundering or tax purposes. To use any of these rights, contact us using the details above. There is normally no charge, and we will reply within one month.

We do not make decisions about you based solely on automated processing.

Cookies and this website

This website does not use cookies, analytics or advertising trackers, and it does not collect any information through forms.

The fonts on this website are loaded from Google Fonts. When your browser loads them, Google receives your IP address and basic browser information. Google's own privacy policy explains how it uses this.

Our website host, IONOS, keeps standard server logs (such as IP addresses and the pages requested) for security and to keep the site running. These are kept for a short period only.

Links to other websites, such as Trustpilot, Facebook and our client portal, are covered by those sites' own privacy policies.

Complaints

If you are unhappy with how we have used your information, please contact us first so we can try to put it right.

You also have the right to complain to the Information Commissioner's Office, the UK's data protection regulator: ico.org.uk/make-a-complaint, telephone 0303 123 1113, or write to Information Commissioner's Office, Wycliffe House, Water Lane, Wilmslow, Cheshire SK9 5AF.

Changes to this policy

We review this policy regularly and will publish any changes on our website, www.adminrescue.co.uk. This policy was last updated on 14 November 2026.

Last update November 2026