

Generated privacy notice - professional services

You can download a Word or ODT version of this generated privacy notice by clicking "Download options" at the top of the page. Alternatively, you can copy and paste it. Both options will allow you to add your own branding or extra text to your new privacy notice, or personalise it by adding your own branding or logo. Remember - you **must** make sure the content is accurate and complete and easily accessible.

Please make sure you delete the green, orange and red instruction boxes before you publish your privacy notice.

You said you collect or use personal information about children, or you weren't sure. If your products or services are likely to be accessed by people under the age of 18 you **must** make sure the way you present it is suitable for those children and can be understood by them. This could include using bite-sized information, diagrams, logos, videos or interactive content that will attract and interest children. For more information, see our guidance on designing [data transparency for children](#). Please note, if you're providing any online services, you must also consider the [ICO Children's Code](#).

RI PARTNERS LIMITED customer privacy notice

This privacy notice tells you what to expect us to do with your personal information.

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- [What information we collect, use, and why](#)
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- [Where we get personal information from](#)
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- [Who we share information with](#)
- [Sharing information outside the UK](#)
- [How to complain](#)

Contact details

Email

dave.law@ripartners.co.uk

What information we collect, use, and why

We collect or use the following information to **provide and improve products and services for clients**:

- Names and contact details
- Addresses
- Pronoun preferences
- Occupation
- Payment details (including card or bank information for transfers and direct debits)
- Transaction data (including details about payments to and from you and details of products and services you have purchased)
- Usage data (including information about how you interact with and use our website, products and services)
- Information relating to compliments or complaints
- Records of meetings and decisions
- Account access information

- Website user information
- Religion & Belief data

We also collect or use the following special category information to **provide and improve products and services for clients**. This information is subject to additional protection due to its sensitive nature:

- Racial or ethnic origin
- Political opinions
- Religious or philosophical beliefs
- Trade union membership
- Sexual orientation information

We collect or use the following personal information for the **operation of client or customer accounts**:

- Names and contact details
- Addresses
- Purchase or service history
- Account information, including registration details
- Information used for security purposes
- Marketing preferences

- Technical data, including information about browser and operating systems

We also collect or use the following special category information for the **operation of client or customer accounts**. This information is subject to additional protection due to its sensitive nature:

- Racial or ethnic origin
- Political opinions
- Religious or philosophical beliefs
- Trade union membership
- Sexual orientation information

We collect or use the following personal information for **information updates or marketing purposes**:

- Names and contact details
- Profile information
- Marketing preferences
- Purchase or account history
- Website and app user journey information

We also collect or use the following special category information for **information updates or marketing purposes**. This information is subject to additional protection due to its sensitive nature:

- Religious or philosophical beliefs
- Trade union membership

We collect or use the following personal information for **scientific or historical research purposes, for statistical purposes or for archiving in the public interest**:

- Names and contact details
- Purchase or client account history
- Website and app user journey information
- Racial or ethnic origin
- Political opinions
- Religious or philosophical beliefs
- Trade union membership
- Sexual orientation information

We collect or use the following personal information to **comply with legal requirements**:

- Name
- Contact information
- Identification documents
- Client account information
- Any other personal information required to comply with legal obligations
-

We collect or use the following personal information for **dealing with queries, complaints or claims**:

- Names and contact details
- Addresses
- Payment details
- Account information
- Purchase or service history
- Call recordings
- Witness statements and contact details
- Photographs
- Relevant information from previous investigations
- Customer or client accounts and records
- Financial transaction information
- Information relating to health and safety (including incident investigation details and reports and accident book records)
- Correspondence

We also collect or use the following special category information for **dealing with queries, complaints or claims**. This information is subject to additional protection due to its sensitive nature:

- Religious or philosophical beliefs

- Trade union membership

Lawful bases and data protection rights

Under UK data protection law, we must have a “lawful basis” for collecting and using your personal information. There is a list of possible [lawful bases](#) in the UK GDPR. You can find out more about lawful bases on the ICO’s website.

Which lawful basis we rely on may affect your data protection rights which are set out in brief below. You can find out more about your data protection rights and the exemptions which may apply on the ICO’s website:

- **Your right of access** - You have the right to ask us for copies of your personal information. You can request other information such as details about where we get personal information from and who we share personal information with. There are some exemptions which means you may not receive all the information you ask for. [Read more about the right of access.](#)
- **Your right to rectification** - You have the right to ask us to correct or delete personal information you think is inaccurate or incomplete. [Read more about the right to rectification.](#)
- **Your right to erasure** - You have the right to ask us to delete your personal information. [Read more about the right to erasure.](#)
- **Your right to restriction of processing** - You have the right to ask us to limit how we can use your personal information. [Read more about the right to restriction of processing.](#)
- **Your right to object to processing** - You have the right to object to the processing of your personal data. [Read more about the right to object to processing.](#)
- **Your right to data portability** - You have the right to ask that we transfer the personal information you gave us to another organisation, or to you. [Read more about the right to data portability.](#)
- **Your right to withdraw consent** – When we use consent as our lawful basis you have the right to withdraw your consent at any time. [Read more about the right to withdraw consent.](#)

If you make a request, we must respond to you without undue delay and in any event within one month.

To make a data protection rights request, please contact us using the contact details at the top of this privacy notice.

Our lawful bases for the collection and use of your data

Our lawful bases for collecting or using personal information to **provide and improve products and services for clients** are:

- **Consent** - we have permission from you after we gave you all the relevant information. All of your data protection rights may apply, except the right to object. To be clear, you do have the right to withdraw your consent at any time.

- **Contract** – we have to collect or use the information so we can enter into or carry out a contract with you. All of your data protection rights may apply except the right to object.
- **Legitimate interests** – we’re collecting or using your information because it benefits you, our organisation or someone else, without causing an undue risk of harm to anyone. All of your data protection rights may apply, except the right to portability. Our legitimate interests are:
 - to enable tailored training and consulting, it is necessary to know the religious and belief data and other protected equality data of our clients

For more information on our use of legitimate interests as a lawful basis you can contact us using the contact details set out above.

- **Recognised legitimate interests** - our pre-approved purpose for collecting or using personal information to provide and improve products and services for clients:

We need to share personal information with a public authority or another organisation because they need it for their public tasks or official functions (the ‘public task disclosure response condition’).

Our lawful bases for collecting or using personal information for the **operation of client or customer accounts** are:

- **Consent** - we have permission from you after we gave you all the relevant information. All of your data protection rights may apply, except the right to object. To be clear, you do have the right to withdraw your consent at any time.
- **Contract** – we have to collect or use the information so we can enter into or carry out a contract with you. All of your data protection rights may apply except the right to object.
- **Legal obligation** – we have to collect or use your information so we can comply with the law. All of your data protection rights may apply, except the right to erasure, the right to object and the right to data portability.
- **Legitimate interests** – we’re collecting or using your information because it benefits you, our organisation or someone else, without causing an undue risk of harm to anyone. All of your data protection rights may apply, except the right to portability. Our legitimate interests are:
 - to enable tailored training and consulting, it is necessary to know the religious and belief data and other protected equality data of our clients

For more information on our use of legitimate interests as a lawful basis you can contact us using the contact details set out above.

- **Recognised legitimate interests** - our pre-approved purpose for collecting or using personal information for the operation of client or customer accounts:

We need to share personal information with a public authority or another organisation because they need it for their public tasks or official functions (the ‘public task disclosure response condition’).

Our lawful bases for collecting or using personal information for **information updates or marketing purposes** are:

- Consent - we have permission from you after we gave you all the relevant information. All of your data protection rights may apply, except the right to object. To be clear, you do have the right to withdraw your consent at any time.
- Contract – we have to collect or use the information so we can enter into or carry out a contract with you. All of your data protection rights may apply except the right to object.
- Legitimate interests – we’re collecting or using your information because it benefits you, our organisation or someone else, without causing an undue risk of harm to anyone. All of your data protection rights may apply, except the right to portability. Our legitimate interests are:
 - o enable tailored training and consulting, it is necessary to know the religious and belief data and other protected equality data of our clients

For more information on our use of legitimate interests as a lawful basis you can contact us using the contact details set out above.

- Recognised legitimate interests - our pre-approved purpose for collecting or using personal information for information updates or marketing purposes:

Our lawful bases for collecting or using personal information to **comply with legal requirements**:

- Legal obligation – we have to collect or use your information so we can comply with the law. All of your data protection rights may apply, except the right to erasure, the right to object and the right to data portability.

Our lawful bases for collecting or using personal information for **dealing with queries, complaints or claims** are:

- Consent - we have permission from you after we gave you all the relevant information. All of your data protection rights may apply, except the right to object. To be clear, you do have the right to withdraw your consent at any time.
- Contract – we have to collect or use the information so we can enter into or carry out a contract with you. All of your data protection rights may apply except the right to object.
- Legal obligation – we have to collect or use your information so we can comply with the law. All of your data protection rights may apply, except the right to erasure, the right to object and the right to data portability.
- Legitimate interests – we’re collecting or using your information because it benefits you, our organisation or someone else, without causing an undue risk of harm to anyone. All of your data protection rights may apply, except the right to portability. Our legitimate interests are:

- o enable tailored training and consulting, it is necessary to know the religious and belief data and other protected equality data of our clients

For more information on our use of legitimate interests as a lawful basis you can contact us using the contact details set out above.

- Recognised legitimate interests - our pre-approved purpose for collecting or using personal information for dealing with queries, complaints or claims:

We need to share personal information with a public authority or another organisation because they need it for their public tasks or official functions (the 'public task disclosure response condition').

Where we get personal information from

- Directly from you
- Publicly available sources
- Market research organisations
- Providers of marketing lists and other personal information
- Suppliers and service providers
-

How long we keep information

[Insert information about how long you store personal information here.]

[You said you didn't have a retention schedule, or you weren't sure. Once you've downloaded or copy and pasted this privacy notice, you can fill the information in above.

You must not publish the privacy notice without it.

For more information, see our guidance on [how long you should store information](#) (opens in a new window).]

Who we share information with

[Insert information about joint controllers here if necessary.]

[You said you weren't sure whether you have a joint controller relationship. Read our [guidance on data processors and joint controllers](#) - if you decide you do work with a joint controller, you can fill the information in above. You must not publish the privacy notice without it.]

Data processors

1st Money

This data processor does the following activities for us: payroll services

Others we share personal information with

- Organisations we're legally obliged to share personal information with
- Suppliers and service providers
- Third parties:
 - none at this point

Sharing information outside the UK

Where necessary, our data processors will share personal information outside of the UK. When doing so, they comply with the UK GDPR, making sure appropriate safeguards are in place.

For further information or to obtain a copy of the appropriate safeguard for any of the transfers below, please contact us using the contact information provided above.

Organisation name: 1st money

Category of recipient: payroll software

Country the personal information is sent to: USA

How the transfer complies with UK data protection law: The country or sector has been assessed as providing adequate protection to data subjects (also known as Adequacy Regulations or UK data bridge)

How to complain

If you have any concerns about our use of your personal information, you can make a data protection complaint to us:

Email: dave.law@ripartners.co.uk

If you remain unhappy with how we've used your data after raising a complaint with us, you can also complain to the ICO.

The ICO's address:

Information Commissioner's Office
Wycliffe House
Water Lane
Wilmslow
Cheshire
SK9 5AF

Helpline number: 0303 123 1113

Website: <https://www.ico.org.uk/make-a-complaint>