

## Privacy policy – AAT bursary

### Applying for a bursary?

As a member and/or customer of AAT, there are many ways you can use the services we offer, some of which require you to share your personal data with us. In these instances, we act as the data controller, making us responsible for deciding the purpose and means for dealing with your personal data.

AAT (Association of Accounting Technicians), a company limited by guarantee (No. 1518983) and registered charity (No. 1050724), (“AAT”, “we”, “us”, “our”) is committed to the privacy of your personal data.

### Our privacy policy explains:

What personal data we collect about you in the course of your engagement with our services, why we collect it, who it goes to and how long we keep it.

How we use your personal data.

How we protect your personal data.

Your legal rights in respect of your personal data, including how to access and update the information we hold about you.

By continuing to use our services, you agree to our use of your personal data on the terms outlined in this policy.

### About the policy

This policy provides you with information on how we’re using your information and the actions we take to protect your privacy.

On specific occasions, we may provide you with additional information when we collect your personal data. This policy is designed to supplement any specific notices and they should always be read in conjunction with each other, so you’re fully aware of how and why we’re using your data.

It’s important that your personal data is accurate and up to date, so we can effectively provide our services to you.

### The data we collect about you

Name.

Date of birth.

Contact details.

Any **other relevant personal information** contained in your application forms, supporting documents uploaded with your application, or that you may provide to us with.

### **What we do with your data and on what grounds**

We can only process your personal data if we have a basis to do so which is permitted by law. This may be that you have given **your consent**, or one of the other lawful bases for data processing outlined below.

To process your bursary application.

Your consent (if received).

Contacting you in relation to your application and, where necessary, any ongoing administration of a bursary award.

Your consent (if received).

Managing payments, fees and charges in relation to any bursary awarded.

Your consent (if received).

To have a bank of case studies available for contact in order to publish stories promoting AAT in magazines, online and in promotional material, subject to further consent.

Your consent (if received).

Invite people to participate in surveys, research and focus groups to provide feedback about an AAT product or service, and process feedback received and follow up with responses if appropriate.

Your consent (if received).

Legitimate interests (to improve our business offerings).

To address enquiries and resolve issues.

Your consent (if received).

To meet our legal obligations, including:

Data management, including to assess and maintain the quality of data stored, including dealing with returned mail and bounced emails and performing analysis on the completeness and correctness of data.

Necessary to meet our legal obligations.

Supporting activities performed under your consent and the substantial public interest (in respect of sensitive personal data).

Our regulatory reporting obligations.

Necessary to meet our legal obligations

To manage complaints and breaches of our regulatory framework and policies, including investigating incidents, publishing consent orders and sanctions and maintaining records for future reference.

Supporting activities performed under the substantial public interest (in respect of your sensitive personal data).

### **Who we share your personal data with**

We will share your personal data with your approved training providers, where a bursary is awarded.

### **How long we keep your data**

We will retain your data for period of **6 years following your application.**

### **Will your personal data be sent abroad?**

If you are a UK-based member of our services, we will generally only process your personal data within the EEA. However, some of the external parties we work with to provide our services to you are based outside of the European Economic Area ("EEA"). Such parties include external chief examiners, training providers, external verifiers, our global branches, foreign embassies and high commissions, third party service providers, overseas supervisory bodies, overseas regulators and certain international partners.

This may require us to occasionally transfer some of your personal data outside the EEA (including to countries which may not be subject to equivalent standards of data protection laws). We'll ensure that any such international transfers are made subject to appropriate safeguards (including the use of EU Commission approved standard contractual clauses) as required by data protection laws to ensure a similar degree of protection is afforded to your personal data.

You may request further information on the specific recipient countries of your personal data or the legal rules and copies of the model clauses in use for transferring data outside the EEA by contacting us at the details below.

### **How do we protect your data?**

We're committed to protecting the security of your personal data, and as such we've put in place appropriate measures to:

Prevent your data from being accidentally lost, used or accessed in any unauthorised way, altered or disclosed

Deal with, and notify you and any applicable regulators, of any suspected personal data breaches where we're legally required to do so

Limit access to your personal details to only those employees, agents, contractors and other third parties who have a business need. They will only be able to process your personal data on our instructions and will be subject to a duty of confidentiality.

We're also security accredited by [Cyber Essentials Plus](#). Cyber Essentials is a government-backed and industry supported scheme to guide businesses in protecting themselves against cyber threats.

### **What are your rights?**

You may have the right to:

Request access to your personal data. You'll be able to request a copy of the personal data we hold about you and check that we're processing it legally.

Request correction of your data. You'll be able to correct and update any incomplete or inaccurate data we hold about you. However, we may need to verify the accuracy of the new data you provide.

Request erasure of your personal data. You'll be able to ask that we delete or remove your personal data where there is no good reason for continued processing. You'll also have the right to ask that we delete or remove your personal data where an objection to processing has been successful, where we may have processed your data unlawfully or where we're required to delete data to comply with local law.

Object to processing of your data. You'll be able to request that we stop using your personal data:

For direct marketing purposes.

Which is being processed on the basis of legitimate interest, when you feel the processing impacts on your fundamental rights and freedom. In some cases, we may demonstrate that we have compelling legitimate grounds to process your information which would override your request.

Request restriction of processing your personal data. This enables you to ask us to suspend processing your personal data in the following scenarios:

If you want us to establish the data's accuracy.

Where our use of the data is unlawful but you don't want us to delete it

Where you need us to hold the data even if we no longer require it as you need it to establish, exercise or defend a legal claim

You've objected to our use of your data, but we need to verify whether we have overriding legitimate grounds to use it.

Request transfer of your personal data to you or a third party. You can request that we transfer your data in a suitably accessible format to you and or a third party, where the data was provided with your consent.

Withdraw consent, where we're relying on consent to process your personal data. This will not affect the lawfulness of any processing carried out prior to your request. If you withdraw your consent, we may not be able to provide certain products or services to you. We'll advise you if this is the case when you request to withdraw your consent.

### **What are the requirements and consequences of making a request?**

Requests relating to changes to our handling of your personal data will generally be free of charge, and we'll aim to respond to all requests within one month. However, please note:

We may need you to supply additional information to confirm your identity and ensure your right to access your personal data (or exercise your rights). This is to ensure that personal data is not disclosed unlawfully.

We may need to contact you to help speed up the resolution of your request.

An administrative fee may be charged for any unfounded, repetitive or excessive requests, or for additional copies of personal data you request.

Occasionally, it may take longer than one month to resolve your request, but in these cases we'll notify you and keep you updated on timing.

Any requests to restrict or delete your data will limit your ability to access our services and products, and/or result in ending your relationship with us.

Please note that these rights apply by law, only to certain types of personal data and processing, and may not be applicable to your circumstances.

If you have any concerns about how we handle your data, please [contact us](#). If you are not satisfied after we've tried to resolve your issue, you'll be entitled to lodge a complaint with our data protection regulator, the Information Commissioner's Office (ICO). Please see the ICO website for further details: [www.ico.org.uk](http://www.ico.org.uk).

If you wish to exercise any of the above rights, you can do this through any of our AAT professional channels or alternatively you can [contact us](#) in writing.

### **Third-party websites and services**

Our website includes links to external, third-party websites. Clicking on these links may allow the collection or sharing of your personal data in ways which will differ to those detailed in our privacy policy. We'd encourage you to read the privacy policies of the external websites you visit from our website.

### **Contact us**

If you have any queries related to this privacy policy, including requests to access or modify the use of your personal data, please contact our Data Protection Office by email to [dataprotection@aat.org.uk](mailto:dataprotection@aat.org.uk) or by writing to us at:

AAT, Data Protection  
140 Aldersgate Street  
London  
EC1A 4HY

We reserve the right to make changes to or update the terms of this policy from time to time. If there are any significant changes made to the policy we'll let you know.

We are making changes to how we manage your data. Please [see our current position](#) for more information.

All personal information held by us will be governed by the most recent privacy policy posted on this website.