

GDPR Information Retention Policy

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Legal Retention

Records that are relevant for income tax as a sole trader must be kept for at least 5 years after the 31 January submission deadline of the relevant tax year.

Typical details that will be kept on record for the legal purpose of an HMRC audit trail, include (but are not necessarily limited to):

- Names of clients (both students and parents), which may need to be cross-referenced with attendance records and / or bank statements
- Parental signatures for sessions attended (for purposes of proof of income)
- Postal addresses of clients visited, for purposes of mileage expenses

There may be other exceptional circumstances in which other information is deemed necessary to keep records for audit purposes. These will be handled and documented on a case by case basis if the need arises, and the client will be informed.

Business Retention

Emails received, or telephone communications (including text messages received), are often automatically stored on the receiving device.

Enquiries from potential clients that are automatically stored in this way, will be kept for 30 days after the last contact made with the client. This is so that the tutor has adequate time to respond fully to any enquiries, conversations are kept fluid, and quotes can be honoured.

Third Parties

No personal information will intentionally be passed to any third parties.