

# INFORMATION WE COLLECT ABOUT YOU

In running and operating our services and this website/ App we collect and deal with certain information relating to you and your use of our service, as follows:

- Identity Data which includes first name, maiden name, last name, username or similar identifier, marital status, title, and date of birth, Employment History, Trade Union Memberships.
- Contact Data which includes postal address, email address and telephone numbers.
- Financial Data which includes National Insurance Number, Tax reference, Income Earned, Tax Calculations, bank details.
- Transaction Data which includes details about payments to and from you.
- Technical Data which includes your login data, browser type and version, time zone setting and location, browser plug-in types and versions, operating system and platform and other technology on the devices you use to access this website/ App.
- Profile Data which includes your username and password, your interests, preferences, feedback and survey responses.
- Usage Data which includes information about how you use our website/App and our services.
- Marketing and Communications Data which includes your preferences in receiving marketing from us and our third parties and your communication preferences.

We do not deal with any Special Categories of Personal Data about you (which are items such as your race or ethnicity, religious or philosophical beliefs, sex life, sexual orientation, political opinions, information about your health and genetic and biometric data). Nor do we collect any information about criminal convictions and offences.

If, however, you inadvertently or intentionally give sensitive personal information to us, you will be considered to have explicitly consented to us processing that sensitive personal information under Article 9(2)(a) of the General Data Protection Regulation. We will use and process your sensitive personal information for the purposes of deleting it. Only details about your Trade Union Memberships will be stored if you provided it to us as HMRC approved Trade Union Memberships' fees are eligible for a tax refund.

## IF YOU DO NOT PROVIDE INFORMATION WE MAY NEED TO CARRY OUT OUR SERVICES FOR YOU

Where we need to collect or deal with information relating to you – either by law or under the terms of a contract we have with you – and you fail to provide that information when re

requested, we may not be able to perform the contract we have or are trying to enter into with you (for example, to provide you with a tax refund service). In this case, we may have to cancel the service you have with us, but we will notify you if this is the case at the time.

## **HOW WE COLLECT INFORMATION RELATING TO YOU**

We use different methods to collect data from and about you including through:

- Direct interactions. You may give us your Identity, Contact and Financial Data by filling in forms or by corresponding with us by post, phone, email or otherwise. This includes personal data you provide when you:
  - apply for our services;
  - create an account through our app;
  - subscribe to our service or publications;
  - request marketing to be sent to you;
  - give us some feedback.
- Automated technologies or interactions. As you interact with our website/ App, we may automatically collect Technical Data about your equipment, browsing actions and patterns. We collect this information by using cookies, server logs and other similar technologies. We may also receive Technical Data about you if you visit other websites employing our cookies. Please see our cookie policy for further details.
- Third parties or publicly available sources. We may receive information relating to you from various third parties and public sources as set out below:
  - (a) Analytics providers such as Google; (b) Social Media platforms such as Facebook / Snapchat
  - Technical Data from the following parties:
  - Contact, Financial and Transaction Data from providers of technical, payment and delivery services such as PayPal, Sage Pay, AIB.
  - Identity, Contact and Financial Data from HMRC
  - Correspondence with clients through Facebook Messenger/ Email

## **PURPOSES FOR WHICH WE WILL USE INFORMATION RELATING TO YOU**

- To register you as a new customer
- To process your claim and to get you the highest possible refund that you may be eligible for.
- To manage payments, fees and charges
- To collect and recover money owed to us
- To manage our relationship with you which will include: (a) Notifying you about changes to our terms or privacy policy, (b) Asking you to leave a review or take a survey and (c) Remind you to sign up for our services year on year
- To enable you to complete a survey to allow us to improve our services
- To administer and protect our business and this website/ App (including troubleshooting, data analysis, testing, system maintenance, support, reporting and hosting of data)
- To deliver relevant website/ App content and advertisements to you and measure or understand the effectiveness of the advertising we serve to you
- To use data analytics to improve our website/ App, products/services, marketing, customer relationships and experiences
- To make suggestions and recommendations to you about services that may be of interest to you

## **LEGAL GROUNDS FOR USING YOUR DATA**

We will rely on the following legal bases under European Data Protection Legislation for processing your personal data:

- Where we were given your consent to do so (you may withdraw your consent at any time – see below)

- Performance of and entry into a contract – the personal details we require are needed to process your claim and to provide you with correspondence relating to your claim
- We have a legitimate interest in doing so as a tax refund company
- Answer your questions and respond to your requests, for example in the context of customer service. This is to meet our contractual agreements with you
- Necessary for our legitimate interests (for running our business, provision of administration and IT services, network security, to prevent fraud and in the context of a business reorganisation or group restructuring exercise)
- Necessary for our legitimate interests (to study how customers use our services, to develop them, to grow our business and to inform our marketing strategy)

## SENDING INFORMATION OUT

We use fully vetted GDPR-compliant distribution centres that help us manage your claim. It is necessary for us to perform our contract with you to use distribution centres to help us deal with the high volumes of applications we receive.

## MARKETING

We strive to provide you with choices regarding certain uses of information relating to you, particularly around marketing and advertising. We have established the following personal data control mechanisms:

- Promotional offers from us. We may use your Identity, Contact, Technical, Usage and Profile Data to form a view on what we think you may want or need, or what may be of interest to you. This is how we decide which services may be relevant for you (and we call this marketing). You will receive marketing communications from us if you have requested information from us or applied for services from us or if you provided us with your details when you begin filling in our online application form and, in each case, you have not opted out of receiving that marketing.
- Third-party marketing. We will only use your personal details for marketing purposes if you have given us consent to do so. We will only use fully vetted-GDPR compliant social media partners to deliver our marketing campaigns. We will

never sell your data to any third party. We use Google Analytics to help us improve our website and our clients' user journeys. General website analytics does not use any identifiable information. Please see our cookie policy for more details.

- Opting out. You can ask us (or third parties we are responsible for) to stop sending you marketing messages at any time by Contacting us at any time. Where you opt out of receiving these marketing messages, this will not apply to information relating to you provided to us as a result of a service purchase, service experience or other transactions related to the contract we have in place with you.

## **COOKIES**

You can set your browser to refuse all or some browser cookies, or to alert you when websites/ App set or access cookies. If you disable or refuse cookies, please note that some parts of this website/ App may become inaccessible or not function properly. For more information about the cookies we use, please see our [cookies policy](#)

## **CHANGE OF PURPOSE**

We will only use information relating to you for the purposes for which we collected it, unless we reasonably consider that we need to use it for another reason and that reason is compatible with the original purpose. If you wish to get an explanation as to how the processing for the new purpose is compatible with the original purpose, please [Contact us](#).

If we need to use information relating to you for an unrelated purpose, we will notify you and we will explain the legal reason which we believe allows us to use it in that way.

Please note that we may process information relating to you without your knowledge or consent, in compliance with the above rules, where this is required or permitted by law.

## **DISCLOSURES OF INFORMATION RELATING TO YOU**

We may have to share information relating to you with the parties set out below for the purposes set out in the table above.

- Internal Third Parties (see the Glossary)
- External Third Parties (see the Glossary)
- Third parties to whom we may choose to sell, transfer, or merge parts of our business or our assets. Alternatively, we may seek to acquire other businesses or merge with them. If a change happens to our business, then the new owners may use information relating to you in the same way as set out in this privacy policy.

We require all these third parties to respect the security of information relating to you and to treat it in accordance with the law. We do not allow our third-party service providers to use information relating to you for their own purposes and we only permit them to deal with information relating to you for specified purposes and in accordance with our instructions.

## **INTERNATIONAL TRANSFERS**

We may share information relating to you with employees and contractors that are based outside of the United Kingdom. This will involve transferring your data outside the European Economic Area (EEA).

However, we ensure that this information is protected by requiring all our employees and contractors to follow the same rules as we do in the UK when dealing with information relating to you. For contractors, we use specific contracts approved by the European Commission which give information relating to you the same protection it has in the UK.

## **DATA SECURITY**

We have put in place appropriate security measures to prevent any information relating to you from being accidentally lost, used, accessed, altered or disclosed in an unauthorised way. In addition, we limit access to information relating to you to those employees, agents, contractors and other third parties who have a business need to know. They will only process such information on our instructions and they are subject to a duty of confidentiality.

We have put in place procedures to deal with any suspected breach of security and will notify you and any applicable regulator of a breach where we are legally required to do so.

## OUR DATA RETENTION POLICY

By law, we have to keep basic information about our customers (including Contact, Identity, Financial and Transaction Data) for six years after they cease being customers, for tax law purposes. We delete it after this time. For more information about data retention, please visit our [data retention policy](#).

In some circumstances you can ask us to delete your data: see Request erasure below for further information.

In some circumstances, we may anonymise information relating to you (so that it can no longer be associated with you) for research or statistical purposes in which case we may use this information indefinitely without further notice to you.

## YOUR LEGAL RIGHTS

Under certain circumstances, you have rights under data protection laws in relation to information relating to you. Please use the Glossary below to find out more about these rights:

- Your right to request access to information that we have relating to you
- Your right to request correction of information that we have relating to you
- Your right to request erasure of information that we have relating to you
- Your right to object to processing of information that we have relating to you
- Your right to request restriction of processing information that we have relating to you
- Your right to request transfer of information that we have relating to you
- Your right to right to withdraw consent if you have previously given consent

If you wish to exercise any of the rights set out above, please Contact us

No fees: You will not have to pay a fee to access any information we have relating to you (or to exercise any of the other rights). However, we may charge a reasonable fee if your request is clearly unfounded, repetitive or excessive. Alternatively, we may refuse to comply with your request in these circumstances.

Confirming your identity: We may need to request specific information from you to help us

confirm your identity and ensure you are allowed to exercise any of the rights above. This is a security measure to ensure that we do not give out information relating to you to any person who has no right to receive it. We may also contact you to ask you for further information in relation to your request to speed up our response.

Time limits: We will try to respond to all legitimate requests to access information as above within one month. Occasionally it may take us longer than a month if the request is particularly complex or you have made a number of requests. In this case, we will notify you and keep you updated.

## GLOSSARY

**LAWFUL BASIS Legitimate Interest** means the interests of our business in conducting and managing our business to enable us to give you the best service/product and the best and most secure experience. We make sure we consider and balance any potential impact on you (both positive and negative) and your rights before we deal with information relating to you for our legitimate interests. We do not use information relating to you for activities where our interests are overridden by the impact on you (unless we are required or permitted to by law). You can obtain further information about how we assess our legitimate interests against any potential impact on you in respect of specific activities by Contacting us.

**Performance of Contract** means processing your data where it is necessary for the performance of a contract to which you are a party or to take steps at your request before entering into such a contract. **Comply with a legal or regulatory obligation** means processing information relating to you where it is necessary for compliance with a legal or regulatory obligation that we are subject to. **THIRD PARTIES Internal third parties** means other companies in the same corporate group as Rebate My Tax Ltd [acting as joint controllers or processors] and who are based in the United Kingdom and provide [IT and system administration services and undertake leadership reporting]. **External third parties** means third parties (who are vetted for GDPR compliance) as follows:

- Service providers who deal with information on our behalf who are based in the UK, who provide IT and system administration services.
- Professional advisers including lawyers, bankers, auditors and insurers based in the UK who provide consultancy, banking, legal, insurance and accounting services.
- HM Revenue & Customs (HMRC), regulators and other authorities based in the UK who require reporting of processing activities.

**YOUR LEGAL RIGHTS** You have the right to:

- **Request correction of information that we hold about you.** This enables you to have any incomplete or inaccurate information we hold about you corrected, though we may need to verify the accuracy of the new information you provide to us.

- **Request erasure of information relating to you.** This enables you to ask us to delete or remove personal information relating to you where there is no good reason for us continuing to deal with it. You also have the right to ask us to delete or remove information relating to you where you have successfully exercised your right to object to processing (see below), where we may have processed your information unlawfully or where we are required to erase information relating to you to comply with local law. Note, however, that we may not always be able to comply with your request of erasure for specific legal reasons which will be notified to you, if applicable, at the time of your request.
- **Object to processing of information relating to you where we are relying on a legitimate interest** (or those of a third party) and there is something about your situation which makes you want to object to processing on this ground as you feel it impacts on your fundamental rights and freedoms. You also have the right to object where we are processing information relating to you for direct marketing purposes. In some cases, we may demonstrate that we have compelling legitimate grounds to process your information which override your rights and freedoms.
- **Request restriction of processing of information relating to you.** This enables you to ask us to suspend the processing of information relating to you in the following scenarios:
  - if you want us to establish accuracy of the information;
  - where our use of the information is unlawful but you do not want us to erase it;
  - where you need us to hold the information even if we no longer require it as you need it to establish, exercise or defend legal claims; or
  - you have objected to our use of the information but we need to verify whether we have overriding legitimate grounds to use it.
- Request the transfer of information relating to you to you or to a third party. We will provide to you, or a third party you have chosen, information relating to you in a structured, commonly used, machine-readable format. Note that this right only applies to automated information which you initially provided consent for us to use or where we used the information to perform a contract with you.
- Withdraw consent at any time where we are relying on consent to process information relating to you. However, this will not affect the lawfulness of any processing carried out before you withdraw your consent. If you withdraw your consent, we may not be able to provide certain products or services to you. We will advise you if this is the case at the time you withdraw your consent.

## Banking Data

Rebate My Tax Ltd is acting as an agent of Finexer LTD, who is authorised by the Financial C

conduct Authority under the Payment Services Regulations 2017, firm reference number 925695, as an Authorised Payment Institution to provide account information services and payment initiation services.

## **Disclaimer**

Rebate My Tax App is in no way affiliated with or endorsed by HMRC. Rebate My Tax App is an independently owned App developed and produced by Rebate My Tax Limited.

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