Privacy notice

Financial Health Check and Business Rates Quick Check

Version 1.1, published 29 November 2026

About this notice

This notice explains how we handle personal information when you ask about, or take part in, our Financial Health Check, or download our free Business Rates Quick Check.

Bitesize Consulting Ltd is the controller of this information. We're registered in England and Wales, company number 09512461, and are a member firm of the Institute of Chartered Accountants in England and Wales, firm number C006264840. Our registered office is 66 Paul Street, London EC2A 4NA. For anything in this notice, email us at hello@bitesizeconsulting.com.

The Night Time Industries Association (NTIA) promotes the Financial Health Check and shares the Business Rates Quick Check with its members. The NTIA doesn't receive the information you give us, or a copy of any report.

This is version 1.1 of this notice, published 29 November 2026. It replaces version 1.0, which covered the Financial Health Check only. If we change it, we'll update the version and date here.

Information collected

What we hold depends on which service you use and how far you go with it.

Stage	Information
Health check enquiry form	Your name, role and email address, and your phone number and NTIA membership number if you give them. The names, company numbers and trading names of the companies you list, and which one the report should be addressed to. Your type of business, number of sites, turnover band, accounting software, who does your bookkeeping, what you'd like help with, and anything you add in the notes.
Health check discovery call	Our notes of what we discuss.
After the health check call	Your answers to our questionnaire, and the financial records you upload through the secure link we send you, such as profit and loss accounts and balance sheets. Your acceptance of the health check terms, with your name, role and the time you accepted.
Your health check report	The report we prepare for you, and our working papers.
Business Rates Quick Check download form	Your first name and email address, your type of venue, turnover band, number of sites and whether you're an NTIA member. Your acceptance of the Quick Check terms, with the time and version, and your marketing choice.

Most of the health check information is about your business rather than about you. Please don't send us employees' names, pay or bank details. We don't need them, and if we receive them we delete them.

If your turnover is under £1m, the health check form tells you the health check isn't the right fit and sends nothing to us.

When you use the Business Rates Quick Check, you run it in an AI tool of your choice. Anything you upload to that tool, such as your rates bill, goes to that tool's provider under its own terms. It doesn't come to us.

Information sources

Most of what we hold comes from you, or from whoever at your business fills in a form or sends us records. When you search for your company on the health check form, we check it against the public register at Companies House, which gives us the company's name, number, status, registered office and date of incorporation.

Purposes and lawful basis

We use your information only to run these services and the work around them.

Purpose	Lawful basis
Replying to your health check enquiry, checking the health check suits your business, and arranging the call	Legitimate interests, in responding to people who ask about our services
Sending you the Business Rates Quick Check and keeping a record that you accepted its terms	Legitimate interests, in providing the free tool you've asked for and being able to deal with any question about it
Understanding which kinds of business use our free tools	Legitimate interests, in improving our tools and services
Protecting our forms from spam and automated abuse	Legitimate interests, in keeping our systems and your information secure
Checking for conflicts of interest before we start a health check	Legitimate interests, in meeting our professional obligations as chartered accountants
Carrying out the health check and preparing your report	Legitimate interests, in providing the health check you've asked for
Keeping a record of the health check work and the terms you accepted	Legitimate interests, in being able to deal with any question or claim about the work
Sending you occasional news and insights by email	Legitimate interests, in keeping businesses in our sector up to date with our work

Purpose	Lawful basis
Identity and anti money laundering checks, if you become a client	Legal obligation
Reporting to the authorities where the law requires it	Legal obligation

Where we rely on legitimate interests, you can object, and we'll stop unless we have a strong reason to continue, such as dealing with a legal claim.

Unless you tick the box on either form to say you'd rather not, we'll add you to our mailing list for occasional news and insights for hospitality businesses. Every email has a link to unsubscribe, and you can ask us to stop at any time.

AI assisted review

For the Financial Health Check, we use AI tools to help analyse the information you send and to draft parts of your report. A qualified member of our team reviews every report before it reaches you. We don't make decisions about you based only on automated processing.

Our AI provider is Anthropic, used through a business account whose terms stop Anthropic using your information to train its models.

Recipients and providers

We don't sell your information, and we share it only with the organisations below.

- Microsoft stores enquiries, sign-ups, uploaded records and reports in our Microsoft 365 environment.
- Netlify hosts our health check and Quick Check forms and passes your answers to our Microsoft environment when you submit them.
- Anthropic provides the AI tools used for the Financial Health Check.
- Cloudflare checks that our forms are being filled in by a person, not an automated program.
- An email marketing provider, acting only on our instructions, sends our news and insights emails, unless you've opted out.
- Our professional advisers, our insurers and the ICAEW may see information where they need to, for example in a claim or a regulatory review.
- Law enforcement and other authorities receive information only where the law requires it, such as under anti money laundering rules.

Storage and transfers

We store this information in Microsoft's European data centres, with the United Kingdom as our committed data location.

Netlify, Anthropic and Cloudflare are based in the United States and may process information there. Each transfer is protected by the International Data Transfer Addendum to the EU standard contractual clauses, issued by the UK Information Commissioner, which forms part of each provider's data processing agreement with us. If any other provider we use processes your

information outside the UK, we'll make sure the transfer has an approved safeguard of the same kind.

Retention periods

We keep information only as long as we need it.

Information	How long we keep it
Health check enquiries and call notes, if you don't go further	Deleted 12 months after the enquiry
Financial records you upload for a health check	Deleted within 12 months if you don't become a client
Your health check report, the terms you accepted and our working papers	Kept for six years, so we can deal with any question or claim about the work
Your Quick Check download form answers	Deleted two years after you download it
A record that you accepted the Quick Check terms (your email address, the date and the terms version)	Kept for six years, so we can deal with any question or claim
Your first name and email address on our mailing list	Kept until you unsubscribe or ask us to stop

If you become a client, the retention periods in your engagement letter apply instead.

Security measures

Information from our forms sits on a dedicated site in our Microsoft environment that only Bitesize staff can open. Our forms send your answers over an encrypted connection and don't keep a copy once they reach us. Each health check upload invitation is made for one business and sent to the email address you gave us. Opening it needs a code that Microsoft sends to that address, so a forwarded link won't work for anyone else.

Your rights

You can ask for a copy of the personal information we hold about you, and ask us to correct it, delete it or limit how we use it. Where we rely on legitimate interests, you can object to our use of it. Where the right applies, you can also ask us to pass it to you or another organisation in a portable form. You can stop our news emails at any time, using the unsubscribe link or by telling us.

To use any of these rights, email hello@bitesizeconsulting.com. We'll reply within one month, and tell you if we need longer.

Complaints process

If you're unhappy with how we've handled your information, please email us at hello@bitesizeconsulting.com. We'll acknowledge your complaint within 30 days, look into it, and tell you the outcome.

You can also complain to the Information Commissioner's Office at ico.org.uk.

Cookies and tracking

Our forms use no analytics or marketing cookies. To protect them from spam, they use Cloudflare Turnstile, which looks at technical signals from your browser, such as your IP address, to check that you're a person. Cloudflare may set cookies that are strictly necessary for this. Cloudflare also uses these signals to improve Turnstile, as explained in its own Turnstile privacy notice.