

## Advantage Accountancy Privacy Policy

The privacy of your personal information is important to us at Advantage Accountancy. We are committed to complying with the Australian Privacy Principles as well as other applicable laws affecting your personal information.

This privacy policy outlines our policy on how we handle your personal information. It also sets out generally what sort of personal information we hold, for what purposes and how we collect, hold, use and disclose that information.

### **Collecting Your Personal Information**

We collect, hold, use and disclose personal information which is reasonably necessary to ensure that we are able to provide you with the services we are engaged to perform. Your personal information will be collected and held by Advantage Accountancy for the purposes of:

- providing you with the services that we have been engaged to perform
- managing our relationship with you or
- making contact with you about your enquiry

Due to the nature of the services we provide, and the requirements of legislation and regulation, we are required to ask for a range of personal information from our clients. This may include:

- Names, employment titles, contact details
- Date of birth and gender
- Information in identification documents (e.g. passport, driver's licence)
- Tax file numbers and other government related identifiers
- Assets and liabilities
- Educational qualifications and employment history
- Personal income
- Visa and work permit status
- Bank account details
- Shareholdings and details of investments
- Superannuation details
- Tax and financial statements
- Information regarding insurance
- Personal information about your spouse and dependants
- Any other information that we may consider necessary.

The personal information collected may include sensitive content such as health information and memberships of professional or trade associations.

We use a variety of methods for the collection of personal and sensitive information. These include:

- Requiring clients to complete a Client Details Form or other forms
- Receipt of emails, letters and other correspondence
- Telephone calls
- Appointments in person
- Publicly available records
- Through use of our website via our online enquiry form
- Through a clients' personal representative

In every circumstance, we will endeavour to obtain such personal and sensitive information directly from you. If it is unreasonable or impracticable, we may need to collect personal information from other sources.

You should only provide us with someone else's personal information where you have their express consent to do so and it is for the purposes of us providing services to you. This policy should be communicated to any person whose information you collect and provide to us. In providing such information you agree that you have obtained the relevant consent and are authorised to do so.

#### **Unsolicited Personal Information**

There may be circumstances where we receive personal information we did not actively seek. Any example may be misdirected mail or emails, or an excess of documents provided to us by clients. If this situation arises we will attempt to notify the relevant person whose information has been mistakenly received.

#### **How Your Personal Information is Held**

Safeguarding the privacy of your information is important to us. Our staff members are trained carefully on handling personal information and confidentiality of such information.

Your personal information is generally held in client files and/or a computer database. Your personal information may also be held in a secure archiving facility.

We will seek to ensure that we take reasonable steps to ensure that the personal information that we hold is protected from misuse and loss and from unauthorised access, modification and disclosure. Some of the measures that we have adopted are having facilities for the secure storage of personal information, having secure offices and access controls for our computer systems.

We will also take reasonable steps to destroy or permanently de-identify personal information that we no longer require for any purpose.

#### **Using and Disclosing Your Personal Information**

We may disclose your personal information to governing bodies or third parties who provide services to us (such as independent auditors or as part of the Quality Review Program conducted by Chartered Accountants Australia and New Zealand). In which case you will be notified and we will seek to ensure that the personal information is held, used or disclosed consistently with the Australian Privacy Principles.

### **Organisations outside Australia**

Currently, we do not share your information with organisations outside Australia.

We may store your information in the cloud or other types of networked or electronic storage. As electronic or networked storage can be accessed from various countries via an internet connection, it's not always practicable to know in which country your information may be held. If your information is stored in this way, disclosures may occur in countries other than those listed. Overseas organisations may be required to disclose information we share with them under a foreign law. In those instances, we will not be responsible for that disclosure.

### **Accessing your Personal Information**

You can gain access to your personal information that we hold. This is subject to exceptions allowed by law such as where providing you with access would have an unreasonable impact upon the privacy of others. If we deny a request for access we will provide you with the reasons for this decision. To request access please contact us (see "Contacting Us and Privacy Issues" below).

### **Correcting Your Personal Information**

We endeavour to take reasonable steps to ensure that the personal information that we collect, use or disclose is accurate, complete and up-to-date. If you believe that any of the personal information that we hold is not accurate, complete or up-to-date please contact us (see "Contacting Us and Privacy Issues" below) and provide us with evidence that it is not accurate, complete and up-to-date.

If we agree that the personal information requires correcting we will take reasonable steps to do so. If we do not correct your personal information we will provide you with the reasons for not doing so. If you request that we associate with the information a statement claiming that the information is not accurate, complete and up-to-date, we will take reasonable steps to comply with this request.

### **Contacting Us and Privacy Issues**

You can obtain further information on request about the way in which we manage the personal information that we hold or you can raise any privacy issues with us, including a complaint about privacy, by contacting us on 07 4041 6777. We are committed to resolving your complaint.