



Privacy Policy

# TaxPlus

ACCOUNTANTS & ADVISORS

TaxPlus Accountants & Advisors

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## **Your Rights of Privacy**

TaxPlus Accountants & Advisors respects your privacy and is committed to treating personal information that we collect in accordance with the Australian Privacy Principles in the Privacy Act 1988 (Cth) (Privacy Act).

This policy outlines the obligations TaxPlus Accountants & Advisors has in managing the personal information we hold about our clients, potential clients, contractors, etc. This includes information such as your name, email address, identification number, or any other type of information that could possibly identify an individual, whether directly or indirectly. This policy is not intended to, nor can it, replace the Privacy Acts themselves.

The Privacy Policy does not apply to acts or practices that are directly related to employee records of current or former employees.

If you would like further information on this privacy policy, you may contact us at [admin@taxplusaccountants.com.au](mailto:admin@taxplusaccountants.com.au)

## **What Personal Information does TaxPlus Accountants & Advisors collect?**

As a provider of accounting, advisory, audit, wealth advisory & finance broking services it may be necessary, and in some cases be a legislative requirement, for us to collect and hold detailed personal information.

In general, the main types of personal information we collect, and hold includes (but is not limited to):

- Names
- Contact details
- Gender
- Dates of Birth
- Employment details and employment history
- Tax File Numbers
- Health information - types of insurance cover
- Details of your financial circumstances,

We will not collect any personal information about you except when you have knowingly told us or have an authorised third party to provide that information to us.

## **How we use your personal information**

TaxPlus Accountants & Advisors acknowledge that your personal information is highly confidential and to this end the information collected by us will only be used for the purpose in which it was intended for unless you have consented to it being used for another purpose - or - if the secondary

purpose for which the information is being used or disclosed is related to the primary purpose and you would reasonably expect such use or disclosure. This may include to:

- provide you with products and services during the usual course of our business activities.
- administer our business activities (including invoicing, account management and recruitment).
- provide you with information about our products and services, invite you to event or distribute articles or publications.
- manage, research and develop our products and services.
- communicate with you by a variety of measures including (but not limited to) by telephone, email, SMS or mail - and -
- investigate any complaints.

You have a right to not provide information that can identify you. If, however, you withhold your personal information, it may not be possible for us to provide you with our products and services, or alternatively, may affect the adequacy and appropriateness of advice or services provided.

#### **How is Personal Information collected and stored?**

TaxPlus Accountants & Advisors may collect personal information from you in a variety of ways, including when you interact with us electronically or in person. This includes (but is not limited to) when you provide feedback, when you provide information about your personal or business affairs, change of your content or email preference(s), respond to surveys and/or promotions, provide financial information and communication with your advisor.

We may also receive personal information from third parties and where this is the case, we will protect it as set out in this Privacy Policy. You have a right to refuse us authorisation to collect information from a third party.

Sometimes, you may provide us with someone else's personal information; for example - other members of your family group. You must not provide that information to us unless you have their consent to do so. You should also take reasonable steps to inform them of the matters set out in this Privacy Policy.

#### **Security of your personal information**

TaxPlus Accountants & Advisors is committed to ensuring that the information you provide to us is stored securely. In order to prevent unauthorised access or disclosure, we have put in place suitable physical, electronic and managerial procedures to safeguard and secure information and protect it from misuse, interference, loss, unauthorised access, modification and disclosure.

Our employees are required to respect the confidentiality of personal information and the privacy of individuals, and privacy and data protection training is undertaken. As part of that training, all employees are required to read this policy and understand their obligations regarding personal information.

Each year all employees are required to acknowledge that they have complied with all aspects of this policy and kept themselves abreast of any changes to this policy.

#### **Retention of your personal information**

We will retain your personal information only if necessary, to fulfil the purpose for which it was collected, as required by law and the Australian Privacy Principles, or in accordance with our documentation retention policies.

### **How can you access and correct your Personal Information?**

You may request details of personal information that we hold about you in accordance with the provisions of the Privacy Act 1988 (Cth). If you would like a copy of the information which we hold about you or believe that any information we hold on you is inaccurate, out of date, incomplete, irrelevant or misleading, please email us at [admin@taxplusaccountants.com.au](mailto:admin@taxplusaccountants.com.au).

We will require you to verify your identity and to specify what information you require.

We reserve the right to refuse to provide you with information that we hold about you, in certain circumstances set out in the Privacy Act or any other applicable law. If access is denied, we will explain the reason why it is denied.

We endeavour to respond to your request for details of personal information we hold, however you should anticipate that it may take some time to process your request as there may be a need to access the information from our archives.

We endeavour to provide you with details of personal information we hold free of charge, however we reserve the right to charge you a fee for providing you with the information. If we propose to charge a fee, we will advise you in advance.

## **Website & Cookies**

### **When you visit our websites**

When you come to our website: ([taxplusaccountants.com.au](http://taxplusaccountants.com.au)) we may collect certain information such as browser type, operating system, website visited immediately before coming to our site, etc. This information is used in an aggregated manner to analyse how people use our site, such that we can improve our service.

We may also collect personal information through subscription applications, event registration and emails. You are not required to provide personal information via our website; however, you may choose to do so in order to receive communications on our services, apply for an employment position or receive invitations to events. Information collected via our digital marketing activities is treated in accordance with this Privacy Policy.

### **Cookies**

We may from time to time use cookies on our websites. Cookies are very small files which a website uses to identify you when you come back to the site and to store details about your use of the site.

Cookies are not malicious programs that access or damage your computer. Most web browsers automatically accept cookies, but you can choose to reject cookies by changing your browser settings. However, this may prevent you from taking full advantage of our websites. Our websites

may from time to time use cookies to analyse website traffic and help us provide a better visitor experience.

In addition, cookies may be used to serve relevant advertisements to website visitors through third party services such as Google AdWords. These advertisements may appear on our websites or other websites you visit.

### **Third party sites**

Our websites may from time to time have links to other websites not owned or controlled by us. These links are meant for your convenience only. Links to third party websites do not constitute sponsorship or endorsement or approval of these websites. Please be aware that CIB Accountants & Advisers is not responsible for the privacy practises of other such websites.

### **Changes to Privacy Policy**

Please be aware that this policy may be updated as and when required, for example, to consider new laws, changes to our operations and practices, changes in the business environment and technology. We may modify this Policy at any time, in our sole discretion and all modifications will be effective immediately upon our posting of the modifications on our websites. Please check back from time to time to review our Privacy Policy.

### **Complaints about privacy**

If you have any complaints about our privacy practices, please feel free to send in details of your complaints to [admin@taxplusaccountants.com.au](mailto:admin@taxplusaccountants.com.au). We take complaints very seriously and will respond shortly after receiving written notice of your complaint.

If you would like access to your personal information, or have any questions about privacy-related issues, you should contact 02 9585 1412 or via email at [admin@taxplusaccountants.com.au](mailto:admin@taxplusaccountants.com.au).

Download a pdf of the Privacy Policy for your convenience.

Contact details:

The Admin Officer, TaxPlus Accountants & Advisors, Suite 5, 4 Cross Street, Hurstville NSW 2220

Phone: 02 9585 1412 OR 02 8084 2261, Email: [admin@taxplusaccountants.com.au](mailto:admin@taxplusaccountants.com.au)