

PRIVACY POLICY

This Privacy Policy covers all services and agreements with Peter I. Price & Associates Pty Ltd (“we/ us”). The privacy of your information is of key importance to us.

This Privacy policy explains how we may collect information and the type of information that we may collect and how we may use, disclose and protect that information.

This applies to information collected online through our website and communicated directly to us by phone, email or other methods of communication in relation to the preparation and lodgement of your tax return (the “Service”).

Types of information

We collect personal information about you, your spouse or de facto, your dependents and your business, as well as other individuals (such as subcontractors and employees), when you use our Service. The information includes, but is not limited to:

- Your Tax File Number (“TFN”)
- Your date of birth and other personal identifying information such as photo identification documents
- Your contact details
- Your income, expenses and other financial information
- Your spouse and de facto personal and income details
- Your login information
- Your bank details
- Your IP address or other system details, when using electronic signature requests

We only collect this information directly from you, submitted to us voluntarily through the website or directly to us by phone, email or other direct method.

This information is required to provide the Service to you and if you choose not to disclose certain information we may not be able to fulfil your request for our Service.

Cookies or other data technologies may be used on our website in order to ensure that the website functions properly, as well as enhance the user experience or to measure the number of users and visitors to the site or specific web pages. This information may be collected individually or in aggregate.

You may opt out or block cookies and other technology on the website or adjust your browser to request permission when a site tries to place a cookie. Parts of the website may not work if cookies are not enabled and we may not be able to fulfil the Service to you. We do not use cookies or data tracking services for marketing or advertising purposes. The Australian Taxation Office (“ATO”) may require that we collect your personal and system information in connection with the preparation and lodgement of your tax return. This may include your TFN, other personal identifying information such as your date of birth and IP address. The ATO may also share information with us about you.

Use of your information

We will use your information to provide the Service that you have requested. We will not share your information with third-parties for marketing purposes.

We may use your information to contact you with relevant information relating to the Service, such as to inform you of communication from the ATO or advise you of statutory deadlines.

We may also use your information to contact you about the Services that we offer or to deliver our newsletter. You may choose to opt out of this communication by emailing info@peterprice.com.au

Disclosure of your information

We may disclose your information to our Service Providers, where permitted by applicable law. These Service Providers are essential to the fulfilment of the Service for you. These Service Providers include our computer software providers.

We reserve the right to update our Service Providers at any time without notifying you.

We also disclose your information when communicating with the ATO and State Taxing authorities. We may be requested to disclose your personal information, including but not limited to your TFN, IP address and bank account details, in order to process and electronically file your tax return.

We may be required to disclose your information to federal, state or other local officials and law enforcement agencies. This may occur if we have a good reason to believe that this

information is required by Law, such as in connection with a court order, legal jurisdiction, or other investigative proceeding that provides a request to us. We may also provide your information to federal, state or local officials to report activities that may constitute a violation of criminal law or to assist in investigating or prosecuting a violation of criminal law.

From time to time, we may need to disclose information relating to your affairs to certain parties including, for example:

- a professional or regulatory body in response to an inquiry or investigation;
- a professional body of which we are a member, in relation to a quality review program undertaken by that body; or
- relevant parties in order to protect our professional interests in legal proceedings.

You hereby authorise us to do so when we consider it appropriate to further our performance of work for You, or when requested by the relevant party.

We will not use or disclose your information for purposes other than set out in this policy or notified to you at the time of collection.

You may choose to opt out of any disclosure of your information, unless it is required by law, by written notification to info@peterprice.com.au or to the postal address detailed below. This may affect whether we are able to fulfil your request to provide the Service to you.

The security of your information

The security of your information is of utmost importance to us.

If we share your information with our Service Providers, we require them to have written conditions that specify the safeguard of your information and prevent them from unauthorised use of your information.

In providing our services to you, we utilise Handisoft using cloud computing provided by The Access Group and we rely on their security measures. We also store client information in a data server managed in the cloud environment provided through Microsoft, which may

include locations outside of Australia. We rely on their security measures, including 2 factor authentication.

Information submitted over the internet or held on electronic storage can never be 100% secure and therefore we cannot guarantee absolute security. We ensure that we take steps to mitigate security risks to the extent that we are able to, such as two-factor authentication and encryption.

We have a duty under law to disclose to you if we suspect that any of your personal data has been compromised.

Length of data storage

Your information is stored on our servers whilst we are providing you with our Service and subsequently, for as long as it is required to comply with our legal obligations.

If you partially complete the online information but do not submit your data to engage the Service, we will keep your information until the end of the following financial year, at which point we will delete this information from our system.

Privacy Policy Updates

This Privacy Policy may change as required from time to time by Law. If we make any material changes to how we collect, store or use your data we will notify you directly by email at least thirty days prior to the change taking effect.

Contact information

If you have any concerns or questions regarding this Privacy Policy or would like to access or discuss your information, you can contact us as follows:

Email: info@peterprice.com.au

Post: Peter I Price & Associates

PO Box 465

Mt Ommaney, Qld 4074