

Synergy Accountants Privacy Policy

Synergy Accountants & Business Advisers Pty Ltd t/as Synergy Accountants ACN 609 806 804 and any affiliated organisations (collectively referred to in this policy as “Synergy Accountants”) is committed to protecting the privacy of your personal information. This privacy policy explains how Synergy Accountants manages the personal information that we collect, use and disclose and how to contact us if you have any further queries about our management of your personal information.

Synergy Accountants is required by the *Privacy Act 1988 (Cth)* (“Privacy Act”) to comply with the Australian Privacy Principles (“APP”). The APPs regulate the manner in which personal information is handled throughout its life cycle, from collection to use and disclosure, storage, accessibility and disposal.

Synergy Accountants are tax agents registered under the *Tax Agent Services Act 2009* and are subject to the *Taxation Administration Act 1953*.

What is personal information?

Personal information is information or an opinion, in any form and whether true or not, about an individual whose identity is apparent or can reasonably be ascertained from the information or opinion. Examples include an individual’s name, address, contact number and email address.

Special provisions apply to the collection and handling of tax file numbers (“TFNs”). Synergy Accountants are lawful tax file number recipients and are bound by the Tax File Number Guidelines 2011 (TFN Guidelines) issued under the Privacy Act.

Collection of personal information by Synergy Accountants

To the extent required by the Privacy Act:

- Synergy Accountants will not collect personal Information about you unless that information is necessary for one or more of our functions or activities
- Synergy Accountants will collect personal information only by lawful and fair means and not in an unreasonably intrusive manner

When Synergy Accountants collects personal information directly from you, we will take reasonable steps at or before the time of collection to ensure that you are aware of certain key matters, such as the purposes for which we are collecting the information, the organisations (or types of organisations) to which we would normally disclose information of that kind, the fact that you are able to access the information and how to contact us (for example, where personal information is collected on a form, we will generally include a written privacy statement with the form that sets out these details).

Synergy Accountants will collect your personal information directly from you where it is reasonable and practicable to do so. Where Synergy Accountants collects information about you from a third party, we will still take reasonable steps to ensure that you are made aware of the details set out above.

Use and disclosure of personal information by Synergy Accountants

If Synergy Accountants uses or discloses your personal information for a purpose (secondary purpose) other than the main reason for which it was originally collected (primary purpose), to the extent required by the Privacy Act, we will ensure that:

- the secondary purpose is related to the primary purpose of collection and you would reasonably expect that Synergy Accountants would use or disclose your information in that way;
- you have consented to the use or disclosure of your personal information for the secondary purpose;
- the use or disclosure is required or authorised by or under law; or
- the use or disclosure is otherwise permitted by the Privacy Act (for example, as a necessary part of an investigation of suspected unlawful activity).

Why does Synergy Accountants collect personal information?

Synergy Accountants collects personal information including TFNs for the management and administration of taxation, superannuation and personal assistance affairs of their clients. This includes individuals, partnerships, companies, self-managed superannuation funds and trusts.

From time to time Synergy Accountants will use personal information for marketing and business development purposes including issuing monthly newsletters, sending invitations to events, notifications of group services and discounts, administering client surveys and contests. Each piece of information sent to you for these purposes will include a provision for you to opt-out of the communication. Alternatively if you do not wish to participate in any of these activities please let us know (our contact details are provided at the end of this policy).

How might we contact you?

We may contact you in a variety of ways, including by post, email, SMS, telephone call or facsimile.

Any electronic message that we send will identify Synergy Accountants as the sender and will include our contact details. If you wish to opt-out of these messages at any time please contact our administration team.

When does Synergy Accountants disclose personal information to third parties?

In providing our services we may need to disclose personal information to third parties, namely the Australian Taxation Office (“ATO”) and other authorised government bodies.

Personal information including TFNs collected for the purposes of administering your taxation, superannuation and personal assistance affairs will be disclosed to the ATO through the lodgment of income tax returns and supporting schedules.

In providing our services we may need to disclose personal information to other third parties besides the ATO. These include but are not limited to financial institutions, finance brokers, financial planners, auditors, legal professionals, suppliers of client offers and services, etc. This information will not be provided without obtaining your express consent to do so. Your consent will be obtained at the time of and for each individual request made.

Synergy Accountants may offer a product or service from an external company to you that we may consider beneficial to you. In order to take up this product or service we would need to provide your personal information to the provider. Your personal information will not be provided without obtaining your express consent to do so at the time of the offer.

Data quality and security

To the extent required by the Privacy Act, Synergy Accountants will take reasonable steps to:

- make sure that the personal information that we collect, use and disclose is accurate, complete and up-to-date;
- protect the personal information that we hold from misuse and loss and from unauthorised access, modification or disclosure; and
- destroy or permanently de-identify personal information that is no longer needed for any purpose that is permitted by the Privacy Act.

Anonymity

Due to the nature of our business it is not practicable for Synergy Accountants to provide individuals with the option of not identifying themselves by remaining anonymous or using a pseudonym when entering into transactions with us.

Use of Commonwealth government identifiers

Synergy Accountants will not use Commonwealth government identifiers (“Identifiers”) (such as Tax File Numbers) as its own identifier of individuals. We will only use or disclose Identifiers in circumstances permitted by the Privacy Act.

Transfer of personal information overseas

If Synergy Accountants transfers your personal information outside Australia, Synergy Accountants will comply with the requirements of the Privacy Act that relate to trans-border data flows. We currently use a number of software packages which utilise information stored in the cloud. Our investigations have shown that our providers are Australian-based, store all information in Australia and are therefore bound by the Privacy Act.

Credit information

Synergy Accountants is a credit provider and is committed to protecting the privacy of your credit information.

When Synergy Accountants collects credit information directly from you, we will take reasonable steps at or before the time of collection to ensure that you are aware of certain key matters, such as the purposes for which we are collecting the information, the fact that you are able to access the information and how to contact us (for example, where credit information is collected on a form, we will generally include a written privacy statement with the form that sets out these details).

Synergy Accountants will not provide your credit information to credit reporting bodies without your express consent.

The security of your credit information is of the highest priority to Synergy Accountants, and we have policies and procedures in place to reflect this.

Access and correction of your personal and/or credit information

Please contact Synergy Accountants if you would like to access or correct the personal and/or credit information that we hold about you. Synergy Accountants will generally provide you with access to your personal and/or credit information (although a fee may be imposed), and will take reasonable steps to amend any personal and/or credit information that is incorrect. In some circumstances, Synergy Accountants may not permit access to your personal and/or credit information, or may refuse to correct your personal and/or credit information, in which case we will provide you with reasons for this decision.

Further information

Please contact Synergy Accountants if you have any queries about the personal and/or credit information that Synergy Accountants holds about you or the way we handle that personal and/or credit information. Synergy Accountants contact details for privacy queries are set out below.

Synergy Accountants Privacy Contact

Attention: Business Manager, Synergy Accountants, PO Box 887, Toowoomba Q 4350

Fax: 07 4639 2942

E-mail: info@synergyaccountants.com.au

Complaints

Please contact the Synergy Accountants privacy contact using the above details if you have any concerns or complaints about the manner in which your personal and/or credit information has been collected or handled by Synergy Accountants.