

Abercrombie Accounting Group Privacy Policy

At Abercrombie Accounting Group (AAG) we are committed to protecting the privacy of our clients' personal information. AAG is bound by the Privacy Act 1988 (Cth) ('Privacy Act') and will protect your personal information in accordance with the Australian Privacy Principles. These principles govern how our firm can collect, use, hold and disclose personal information, as well as ensuring the level of quality and security of all personal and/or confidential information.

Collection of Personal & Confidential Information

Personal and/or confidential information can include any information or an opinion about an identified individual/s who can be reasonably identified from this particular information.

The kinds of information AAG collects and holds will depend on what service you require from us. The types of personal and confidential information we may collect from you can include any or all of the following:

- Personal details such as name, address, contact details, date of birth, marital status, your dependents and employment details;
- Tax file number;
- Financial details, such as liabilities, assets, expenses and incomes;
- Investment details, such as bank account details, share documents (showing SRN/HIN) and superannuation details;
- Insurance policy details including those of private health insurance;
- Estate planning details, including wills, executors, beneficiaries and powers of attorney;
- Personal health information including your current health condition, smoker status and your medical history and expenses; and
- Professional and/or Trade memberships, political memberships and ethnic origins.

Our firm will collect, use, hold and disclose personal information to provide our clients with products and services. This can include any or all of the following:

- Provision of accounting, taxation, financial planning and superannuation services;
- To provide agreed services to assist in meeting our clients requirements, goals and objectives, such as strategic and business planning, business startup, preparation of financial statements for audit/ASIC or financing purposes;
- Assistance with regulatory requirements; and
- Providing assistance with the coordination of other experts and professionals such as solicitors, bank managers and financial brokers.

Our firm will collect majority of personal and confidential information directly from our clients. This can be collected either in interviews, over the telephone, through email correspondence or by the completion of AAG's client information forms. We may collect personal or confidential information about you from other people or organisations, which may happen without your direct involvement. For instance, AAG may collect information about you from:

- Your representatives (legal advisor, mortgage broker, executor);
- Your employer; and
- Other organisations who provide products or services jointly with us.

Much of the information our firm holds about our clients will be sorted electronically in a secure database, which is located in Abercrombie Account Groups' premises and owned by Abercrombie Accounting Group. There will be little personal information we hold about you stored in paper files. Our firm uses a range of physical and electronic security measures to protect the security of the personal information we hold. This includes any or all of the following:

- Access to our information systems is controlled through identity and access management, such as username and password protection;
- All of the information that is stored on our online data server is encrypted;
- Our website is protected by a firewall;
- Our offices are securely locked after hours;
- All employees are bound by internal information security policies and are required to keep all information secure;
- Our firm regularly monitors and reviews our compliance with internal policies and industry best practice; and
- Our firm takes reasonable steps to destroy any personal information.

Use and Disclosure

Our firm uses and discloses the personal information collected by us for one or all of the following reasons:

- Where our clients have consented to such disclosure; and
- Where our staff are required or authorised by law, or where our staff have a public duty to do so.

Our firm may provide personal information about our clients to organisations outside of Abercrombie Accounting Group. Generally, we disclose personal information to organisations that help us with our business and services that we provide to you. These may include any or all of the following:

- Contractors and external service providers (for example, technology service providers);
- Payment system operators (for example, merchants receiving card payments);
- Other organisations, who jointly with us, provide products or services to you;
- Financial services organisations, including banks;
- Our legal advisors or auditors;
- Your representatives (for example, legal advisors, mortgage brokers and executors);
- IT Service providers; and
- Regulatory bodies, Government Agencies and Law Enforcement bodies in any jurisdiction.

If you choose not to provide your information

If our clients do not provide us with the personal information we have requested; we may be unable to provide the services required and elect not to perform for the client.

Marketing

We may use personal information collected for our clients for providing you with direct marketing material such as electronic newsletters. If you do not wish to receive newsletters, you can request not to receive it, simply by contacting our office or following the newsletter prompts to do so.

Accessing and correcting your information

Our team is committed to ensuring that the information we hold about our clients is recent, accurate and complete.

You can request to access the personal information we hold about you, or enquire about what we do with it. You can also ask us to update or change information we hold about you at any time.

Complaints

If you are concerned about how your personal information is handled, or if you have a complaint, please contact the Practice Manager, Paul Abercrombie.

If you are unhappy with our response, you can refer your complaint to:

The Office of the Australian Information Commissioner

The Commissioner can be contacted at:

GPO Box 5218

Sydney NSW 2001

Phone: 1300 363 992

Email: enquiries@oaic.gov.au

Website: www.oaic.gov.au