

## TAXCO ACCOUNTING SERVICES PTY LTD TRADING AS BURTON PARTNERS

### PRIVACY POLICY (Collecting Customer Information)

Taxco Accounting Services Pty Ltd (ACN 131 081 760) (“Taxco Accounting Services Pty Ltd trading as Burton Partners”) understands that you value your privacy and wish to have your personal information kept secure. For these reasons, Taxco Accounting Services Pty Ltd trading as Burton Partners places a high priority on the security of information we hold. We have developed this policy to inform you of how we manage your personal information and maintain its integrity and security.

We are bound by the *Privacy Act 1988* and must comply with the National Privacy Principles. You can find more information about the Privacy Act and the National Privacy Principles at the Office of the Australian Information Commissioner (OAIC) website at [www.oaic.gov.au](http://www.oaic.gov.au).

While we believe in keeping your personal information highly secure, we also believe that you have the right to be informed about how we deal with that information so, if on reading this policy you are unclear on any of the matters or simply want more information, please contact us on the telephone number or addresses provided below.

#### **Collecting Personal Information**

We aim to collect personal information only if it is relevant and necessary to providing the service or product you have requested from Taxco Accounting Services Pty Ltd trading as Burton Partners.

In general you can assume that we collect and hold the following information:

- Personal details such as name, address, contact details, ( email, telephone facsimile), date of birth, marital status, dependants, employment details;
- Financial details e.g. assets, liabilities, income, expenses;
- Taxation information e.g. tax file number;
- Cent relink details e.g. benefit type and reference number
- Details of investments, amounts, investor numbers and bank details;

In most cases we will collect this information from you directly however in some cases we may purchase information from list owners or managers.

Naturally we collect and hold a broad range of personal information gathered during the course of providing our services. However as stated above, we strive to ensure that we collect and hold only that personal information which is relevant and necessary to your specific matters.

#### **Purposes of Collection**

We collect information primarily to:

- Provision of accounting services;
- Completion of associated documentation and application forms;
- To provide agreed services to assist in meeting your requirements.

We may also use the information:

- to send newsletters to you;

- to invite you to seminars or events hosted by Taxco Accounting Services Pty Ltd trading as Burton Partners;
- to inform you of products that can be purchased from Taxco Accounting Services Pty Ltd trading as Burton Partners;
- to inform you of developments at Taxco Accounting Services Pty Ltd trading as Burton Partners and other services that we can provide.

### **Third Parties**

The following third parties may have access to personal information:

- IT technicians may have access when providing on-site support although it is our practice for them to work under supervision;
- file storage services.

We will not otherwise disclose information about you unless the disclosure:

- is required by law;
- is authorised by law; or
- you have consented to our disclosing the information about you.

### **Personal Information Quality**

We aim to ensure that your personal information is accurate, complete and up to date. To assist us in this, you need to provide true, accurate, current and complete information about yourself as requested and properly update the information to us to keep it true, accurate, current and complete.

If you believe that the information is inaccurate or incomplete, please contact us and we will use all reasonable effort to correct the information.

In the event that we do not believe the information to be incorrect, we will take reasonable steps to add a statement to the information claiming that you believe the information is not accurate, complete or up-to-date.

### **Securing Your Personal Information**

We are committed to maintaining the security and confidentiality of the data you provide us and we will take all reasonable precautions to protect your personal information from unauthorised disclosure, use or alteration.

We have the following security measures in place to protect your information:

- after hours access to the building is by mill key only and access is monitored by video equipment on the ground floor and in the car park;
- our offices are also securely locked after hours;
- all computers have password protection;
- all computers linked to our intranet are password protected and virus protected;
- our offices are monitored regularly by a security service;
- our website is protected by a firewall; and
- our employees all sign confidentiality agreements as part of beginning employment at Taxco Accounting Services Pty Ltd trading as Burton Partners.

### **Accessing Your Personal Information**

You have a limited right to access all personal information that we hold about you. In limited circumstances, we may refuse your request to access, in which case, we will give you a reason for that refusal.

We are not required to provide access where:

- denying access is required or authorised by law; or
- providing access would be unlawful.

### **Changes to this Statement**

This Privacy Policy is not a static document, we may make changes to this Privacy Policy from time to time for any reason. We will publish these changes on our website.

### **Contacting Us**

If you would like further information regarding this Privacy Policy, if you have concerns about the information that we currently hold about you, or any aspect of this Privacy Policy, please contact the Privacy Officer at:

<b>Telephone</b>	03 9703 2828
<b>Email</b>	info@burtonpartners.com.au
<b>Post</b>	Taxco Accounting Services Pty Ltd trading as Burton Partners First Floor, 11-15 Marlo Place HALLAM VIC 3803