

Privacy Policy

In this Privacy Policy, 'DAA', 'we', 'us' and 'our' mean Dobson Accountants & Advisers Pty Ltd.

We respect your privacy

DAA respects your privacy and is committed to treating the personal information we collect in accordance with the Privacy Act 2020 (Privacy Act). This Privacy Policy outlines the obligations DAA has in managing the personal information we hold about our clients, potential clients, contractors and others. Personal information is any information that can identify an individual, either directly or indirectly. If you would like further information on this Privacy Policy, you may contact us at contactus@dobsonaccountants.com.au

Personal information we collect

As a provider of accounting and advisory services we are subject to certain legislative and regulatory requirements which necessitate us obtaining and holding 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
- Details of your financial circumstances, including bank account details, your assets and liabilities (both actual and potential), income, expenditure, insurance cover and superannuation
- Health information (for some types of insurance cover)

How we use your personal information

DAA will use personal information for the following lawful purposes in connection with our products and services:

- a. Provide you with services and products during the usual course of our business activities;
- b. Administer our business and operational activities, including meeting legal, regulatory and compliance obligations;
- c. Manage, research and develop our products and services;
- d. Provide you with information about our products and services, distribute articles or publications;
- e. Communicate with you by a variety of measures including, but not limited to, by telephone, email, SMS or mail;
- f. Investigate any complaints;
- g. Carry out appropriate checks and verification, including Customer Due Diligence as required by The Anti-Money Laundering and Counter-Terrorism Financing Act 2006 ;
- h. Enforce any legal rights that we have against you; and
- i. Any other uses to which you consent.

If personal information is used for purposes beyond those described, notice will be provided where required.

DAA may use artificial intelligence tools to support and enhance its services and products. These tools may assist with activities such as automating tasks and generating meeting notes and draft communications. As with any software and tools, the use of AI is subject to the providers privacy policy and security measures.

You have a right not to provide personal information requested by us. 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 or appropriateness of advice or services provided.

How we collect your personal information

DAA collects personal information from when you interact with us remotely (including electronically) and in person. This includes, but is not limited to, when you provide feedback, when you provide information about your personal or business affairs, change your content or email preference(s), provide financial or credit card information, or communicate with us. We may also gather personal information through the use of our websites. We may also receive personal information from third parties. 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, e.g. other members of your family group. You must not do this 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.

Disclosure of personal information

In providing our services we may need to disclose personal information to a third party. This will be done to the extent that it is permitted by law and set out in this Privacy Policy. Examples of the types of third parties we may disclose personal information to include:

- DAA and their related bodies corporate and other associated entities.
- Companies or individuals engaged to assist us in providing services or who perform functions on our behalf (such as specialist consultants, legal professionals such as barristers and solicitors, contractors or temporary employees, information technology service providers, superannuation fund trustees, insurance providers, fund managers, and other product providers).
- Courts, tribunals, law enforcement and regulatory authorities, as required or authorised by law.
- Auditors or compliance officers, as required or authorised by law or Professional Associations.
- Anyone else to whom you consent or to whom disclosure is directly related to the purposes in connection with which the information was obtained, such as banks, financial advisers and other financial institutions.
- If there is a change of control in our business or a sale or transfer of business assets, we may transfer to the extent permissible at law our user databases, together with any personal information and non-personal information contained in those databases.
- To third parties (such as debt collectors) where we are seeking to enforce any rights against you.

Where you engage us to attend to your tax affairs we will assume (unless you advise otherwise) that you have specifically authorised us to deal directly with the Australian Tax Office and any overseas tax authority regarding day to day type matters. If, in the course of our dealings with these bodies, they request information regarding you that we believe is outside of such matters, we will request your specific authority before complying with their request.

Hosting and International Data Transfers

Depending on the nature of the engagement or circumstances of personal information collection, we may disclose your personal information to entities overseas (where we are authorised to disclose your personal information – see Disclosure of Personal Information, above).

We engage third party service providers to support the delivery of our services and overall business operations. This includes providers of software, cloud storage, IT systems, and other specialist services. Some of these providers may be located overseas and/or may store and process personal information outside Australia.

Publication of Personal Data

You acknowledge that personal information that you submit for publication through our website or services may be available, via the internet, around the world. We cannot prevent the use (or misuse) of such personal information by others. There may be circumstances in which the disclosure of the information is required or authorised by law or a court/tribunal order, or where you have given your direct consent to disclose it.

Transmission, Storage and Retention of your personal information

The transmission and exchange of information is carried out at your own risk. We cannot guarantee the security of any information that you transmit to us or receive from us. Although we take measures to safeguard against unauthorised disclosures of information, we cannot assure you that personal information that we collect will not be disclosed in a manner that is inconsistent with this Privacy Policy.

DAA retains personal information for as long as necessary to fulfil legal, regulatory, and business purposes. In order to prevent unauthorised access or disclosure, we have put in place physical and electronic procedures to safeguard and secure information and protect it from misuse, interference, loss and unauthorised access, modification and disclosure.

Our employees are required to respect the confidentiality of personal information and the privacy of individuals. As part of training, all employees are required to read this Privacy Policy and understand their obligations in respect to personal information.

Access to your personal information

You have the right to request access to your personal information, or to request that it be corrected if inaccurate, outdated, or incomplete. Requests must be submitted in writing through contactus@dobsonaccountants.com.au, and identification may be required. 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.

Third party websites

Our website 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 DAA is not responsible for the privacy practices of other such websites. We encourage our users to be aware, when they leave our website, to read the privacy statements of each and every website that collects personal identifiable information.

Changes to this Privacy Policy

Please be aware that this Privacy Policy may be updated as and when required in our sole discretion, for example, to take into account new laws, changes to our operations and practices, changes in the business environment and technology. The most recent version will be made available upon request or published on our website.

Contacting Us

For any enquiries regarding this Privacy Notice, to access or correct personal information, or to lodge a complaint, please contact us on 02 8515 0278 or email contactus@dobsonaccountants.com.au