

# Cape York Accounting - Westcourt

## PRIVACY POLICY

Under current legislation, Cape York Accounting – Westcourt is required to abide by the Privacy Act. We encourage you to read this Privacy Policy, to ensure you are aware of how we protect the personal information provided to us.

Cape York Accounting – Westcourt provides accounting/bookkeeping/taxation/finance services, and in the course of providing these services, we collect information about our clients. We are committed to protecting the privacy of this information.

As a client of this practice, you need to provide us with your personal details, including, name, date of birth, address, telephone/other contact information, Tax File Number, ABN, family details, detailed information on income, eligible insurance and superannuation policies, and eligible expense claims. This information is required to complete your taxation obligations to the Australian Taxation Office, and to confirm or obtain eligibility for benefits available to you from the Family Assistance Office and Centrelink / Veterans Affairs.

In certain circumstances, we may obtain details of your credit card for payment of accounts, or bank account details for EFT payment of refunds.

Should you pass away, we will require details of your dependents, and beneficiaries to enable us to complete your taxation obligations.

### **How do we collect this information?**

We collect most of the information from you in person or by telephone. We also obtain some information from documents and records supplied by you to this office.

We may also collect information about you from other family members, with your permission, and from the Australian Taxation Office, if you are registered on our Tax Agent list. We may also receive information from your employer such as contact details, or matters relevant to a PAYG Summary issued by that employer. With your express written authority, we may also access information from your former tax agent, Centrelink, or your financial institution/s.

### **How do we use this information?**

Generally we only use personal information that we collect from you for the purpose of completing your taxation obligations to the Australian Taxation Office, or other accounting or taxation tasks as requested by you.

We may also use this information from time to time to contact you to advise you of

- ❖ new financial, taxation, or any other legislation, which in our opinion, may have some effect on you
- ❖ new products or services offered to you by this practice, which in our opinion, may benefit you
- ❖ products or services offered by a third party/s, which in our opinion, may benefit you.

You may, at any time, elect not to receive further information on products/services offered by a third party.

### **Can you access the personal information we have about you?**

You may request access to any of the personal information we hold about you. For security reasons, we will not provide information over the telephone unless you are able to confirm your identity. You are unable to access information of any sort about a third party, even if this individual is related, without proper authorisation provided by that third party.

**Liability limited by a Scheme approved under Professional Standards Legislation.**

Ph: 07 4031 1940 Fax: 07 4031 1894 Email: [cyawestcourt@bigpond.com](mailto:cyawestcourt@bigpond.com)

Post: P O Box 41W Westcourt Qld 4870

# Cape York Accounting - Westcourt

Cape York Accounting - Westcourt will retain your records for a period of time after you cease being a client. We are required to retain taxation records for a period of 5 years, from date of lodgement.

## Do we disclose your personal information to anyone?

Cape York Accounting – Westcourt may not disclose your personal information to any third party, unless provided for in government legislation. This is explained in detail below. However, we will provide information to any party outside of this practice, if it is authorised by you. Examples of reporting authorised by you include providing information to credit providers or financial institutions, confirming financial taxation information to support finance / rental / lease applications.

From time to time, we are required by law to disclose your personal information. Examples of this and the reasons are detailed below:

- Australian Taxation Office - when required by the Taxation Act
- Centrelink and Family Assistance office - when required by the Social Security Act
- Police or Courts - in response to warrants or subpoenas.
- Australian Securities & Investment Commission - when authorised by Corporations Act

Sometimes research is required to correctly and professionally complete your taxation and financial obligations. In these instances, we may divulge only that part of your personal information absolutely necessary, to determine your claim. We would normally seek your approval before using outside research and or information services. All such instances are governed by the same elements of the Privacy Act as this practice. Examples of this and the reasons are detailed below:

legal advisors - for legal opinion

Professional Bodies - e.g. CPA, ICAA, NIA, NTAA, or TIA for detailed research.

We may also disclose your personal information to particular outside individuals or organisations only when authorised by you. Examples are your financial planner, or an agency engaged by you for a function which requires access to information held by this practice. Such authorisation may be written or verbal.

## How do we protect your information?

Only authorised staff who are employed under strict confidentiality agreements, have access to your records. The information is stored in electronic and manual filing/archive systems. The hardware and software applications are protected by network and workstation password, designed to protect against unauthorised access. Manual filing/archive records are protected by security key, electronic security monitoring and keypad entrance security codes. Generally Email is not a secure means of communication, however our Internet service provider uses industry standard protocols to protect the personal information you disclose in using these facilities.

## Contact for questions about our Privacy Policy or a breach of your privacy

Admin Manager

P O Box 41W

Westcourt Qld 4870

Ph: 07 4031 1940

Fax: 07 4031 1891

Email: [admin.cyawc@bigpond.com](mailto:admin.cyawc@bigpond.com)

## If you are dissatisfied with our response

If you are not satisfied with the result of your complaint, you may refer the complaint to the Federal Privacy Commissioner whose details appear below:

Director of Complaints

Office of the Federal Privacy Commissioner

GPO Box 5218

SYDNEY NSW 1042

Ph: 1300 363 992

Policy dated 15 January 2003 (amended 16 February 2009)

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