

## PRIVACY POLICY

### 1. Introduction

Burswood Partners is committed to protecting the privacy and confidentiality of personal information in accordance with the Privacy Act 1988 (Cth) and the Australian Privacy Principles (APPs).

This Privacy Policy outlines how we collect, use, disclose, and manage personal information.

### 2. What Personal Information We Collect

We may collect the following types of personal information:

- Full name, address, date of birth, and contact details
- Tax File Numbers (TFNs), Australian Business Numbers (ABNs)
- Financial records, bank details, employment and income information
- Information about business operations and financial performance
- Information required for tax returns, BAS, audits, or financial statements

### 3. How We Collect Personal Information

We collect personal information:

- Directly from you (in person, via email, phone, or through our website)
- From third parties, such as the Australian Taxation Office (ATO), financial institutions, or your employer (with your consent)
- When you complete our forms or provide documents
- Through our website (e.g. contact forms, cookies – see Section 9)

### 4. Why We Collect Personal Information

We collect, hold, use and disclose your personal information to:

- Provide accounting, taxation, business advisory, and related services
- Comply with legal and regulatory obligations (e.g., ATO requirements)
- Communicate with you
- Maintain accurate client records
- Improve our services

## 5. Disclosure of Personal Information

We may disclose your information to:

- Government authorities such as the ATO or ASIC
- Third-party service providers (e.g., cloud hosting providers, software vendors)
- Financial institutions or your nominated representatives
- Other third parties as required or authorised by law

## 6. Storage and Security

We take reasonable steps to protect personal information from misuse, interference, loss, and unauthorised access or disclosure. This includes:

- Secure physical and electronic storage systems
- Password protection, authentication regime, and security software programs.
- Staff training in privacy obligations

For further information refer to our Cyber Security Policy

## 7. Access and Correction

Our clients have the right to access their personal information and request corrections if it is inaccurate or outdated.

## 8. Retention and Personal Information

We retain personal information for as long as necessary to fulfil the purposes outlined in this policy and to comply with legal obligations, including the retention periods set by the ATO and other regulatory bodies.

## 9. Website Cookies

When a person visits our website, we may collect limited information via cookies and similar technologies. This helps us analyse website traffic and improve the user experience. Cookies can be managed in the settings via the utilised browser.