

Privacy Policy – Welsh Tax Pty Ltd

We will provide timely quality tax solutions to our clients. In order to enable us to achieve this we will need to collect personal information about you and your financial matters. Personal information includes information about you that identifies you/ your identity which can be easily determined. We use this information to identify the tax issues of your matter, the level of advice on that matter, to contact to you and to ensure that you are given the best service and advice for your particular circumstances.

We will collect your personal information directly from you where possible. Where we are unable to obtain personal information directly from you we will require your consent before information is obtained from another party. This collection may occur when taking instructions from you, contact with your Bank or financial institution, or any other party at your request (such as solicitor, real estate agent). Collection may also occur (indirectly or directly) when you require us to act on other matters on your behalf during the course of our relationship. We will treat your personal information with the utmost respect & confidence to ensure that your personal information is treated with the appropriate privacy. Without our personal information we would not be able to provide our business services to you at their full potential.

We will where require you to consent in writing to any use or disclosure of your personal information. At times we may however accept your verbal consent to disclose your personal information as instructed. We will act in your best interests and in accordance with this privacy policy only deal with your personal information as mentioned whether consent actual or implied.

In instances such as court direction or proceedings we may be bound to disclose your personal information. Other instances may include your personal information on government or court documents. We will do our best to protect the safety of your personal information. We may also need to disclose your information to The Australian Taxation Office (for all tax related matters), ASIC (all ASIC matters), our staff, other government agencies (financial assistance etc), your bank or lending institution (all banking matters), your solicitor or any other businesses as you request.

We will have our computer systems reviewed regularly to ensure security of your data and to identify any potential threats. We will take all reasonable precautions to safeguard your data and your personal information. Such safeguards in place to protect information that is held by us on file (computer and physically) from any loss, unauthorised access, misuse, change or disclosure. We will have staff sign confidentiality agreements, limited computer access, computer protection and file access, up to date technology and regular review. We will shred all confidential paperwork that is to be disposed. When you are no longer a client of our firm we will archive your file for 5 years from date of leaving and after that 5 year period we will confidentially dispose of the data.

If you wish to access your personal information please contact us and allow 7 days (from date of receipt of request) for this information to be readied. We do retain the right to deny access to personal information where the information may relate to existing or anticipated legal proceedings of any type.

We may from time to time send you articles or other information relevant to you and your circumstances. If you do not wish to receive this or any other information please feel free to advise us. We will not intentionally disclose your information to any outside source. Please keep us up to date (as soon as is known) of any change of your personal information so that our files are always up to date. Such changes can include marital status, address changes, phone numbers and the like. This will avoid any mail/emails being sent to out of date addresses.

Ongoing we will monitor regulations and policies to keep up to date on any changes in the law which may in turn result in updates to this policy. If you wish to access your personal information please contact us in writing at info@welshtax.com.au. If you have any complaints about the handling of your personal information please contact us by phoning 07 5494 9173 or emailing info@welshtax.com.au. The below link will guide you as to the the steps to your complaints process firstly with our office and secondly if you are unhappy with our handling of your complaint.

The Office of Australian Information Commissioner (OAIC)

<https://www.oaic.gov.au/privacy/privacy%20complaints/complain-to-an-organisation-or-agency/>