

# Audit Me Privacy Policy



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## 1. Preamble

We understand that keeping your information confidential and secure is important to you – and it's very important to us too. To help you understand how we collect, use and share your information we've developed this Privacy Policy. This Privacy Policy (we refer to it as the 'Policy') sets out how Audit Me ('we', 'us' and 'our') explains the types of information we may collect from and about you or your business, how we may use or disclose that information, and how we protect that information.

## 2. What is Personal Information and why do we collect it?

Personal Information is information or an opinion that identifies an individual. We collect information, including personal information, about you, your business, and other individuals (such as clients, employees as part of providing business services) when you use our services. This information includes, but is not limited to:

- Contact Information (e.g., name, phone number, address, email address)
- ABN/ACN/Licensee details and other government identification numbers
- Financial information (e.g. income, credits, deductions, expenses and bank account information)
- Login information
- Client data including address, email address, BSB and account number.

We collect and hold a broad range of personal information during the course of providing our services. However, we strive to ensure that we collect and hold only that personal information which is relevant and necessary to advise on the specific matters you have asked us to address.

## 3. How we collect your personal information

Personal Information is obtained in many ways including when you interact with us electronically or in person; through the use of our standard forms or questionnaires; via our website [www.audit-me.com.au](http://www.audit-me.com.au); from your website and when we provide our services to you.

Generally, we will collect personal information directly from you. Sometimes it may be necessary for us to collect your personal information from a third party, or from a publicly available source. We will only collect personal information this way where you have

consented or you would reasonably expect us to collect personal information in that way, or if it is necessary for a specific purpose in the delivery of our services.

## 4. Using and disclosing your Personal Information

We use your information to provide you the products and services you request. We collect your personal information for any one or more of the following reasons:

- To verify your identity.
- To evaluate, effect, manage and administer the services provided by us.
- To assist with your queries.
- Facilitating our internal business operations, including the fulfilment of any legal obligations and analysing our services and client needs with a view to developing new and/or improved services.
- Communications with relevant regulatory bodies.

Audit Me does not provide personal information to other organisations, agencies or anyone else unless one of the following applies:

- The person has consented.
- The person would reasonably expect, or has been told, that information of that kind is usually passed to those individuals, bodies or agencies.
- It is required by law or is necessary to protect the rights or property of Audit Me or any other individual.
- It will prevent or lessen a serious and imminent threat to somebody's life or health.
- In other circumstances permitted by the Australian Privacy Principles (e.g. if the disclosure is reasonably necessary for law enforcement purposes).
- The disclosure is to a service provider or advisor retained by Audit Me and is necessary in order to assist Audit Me to provide services to you.
- Our files may be subject to review as part of the quality control review program of CPA Australia which monitors members' compliance with professional standards.

## 5. Security of Personal Information

Your Personal Information is stored in a manner that reasonably protects it from misuse and loss and from unauthorized access, modification or disclosure.

In order to prevent unauthorised access or disclosure, we have put in place suitable physical, electronic and managerial procedures to safeguard and secure information and protect it from misuse, interference, loss and unauthorised access, modification and disclosure.

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.

When your Personal Information is no longer needed for the purpose for which it was obtained, we will take reasonable steps to destroy or permanently de-identify your Personal Information. However, most of the Personal Information is or will be stored in client files which will be kept by us for a minimum of 7 years.

## **6. Disclosure of your personal information overseas**

We will not disclose your personal information to recipients outside of Australia.

## **7. Access and correct your personal information.**

You have the right to access your own personal information held by us, and where this is incorrect, to request that we correct the information.

To access personal information, simply contact us by phone (0437 251 400) or in writing ([alison@audit-me.com.au](mailto:alison@audit-me.com.au)) and request the personal information we hold on the file in relation to you. We will provide access to the information fairly and efficiently, in an appropriate format and within a reasonable timeframe that will be agreed with you. 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.

It is an important to us that your Personal Information is up to date. We will take reasonable steps to make sure that your Personal Information is accurate, complete and up-to-date. If you find that the information we have is not up to date or is inaccurate, please advise us as soon as practicable so we can update our records and ensure we can continue to provide quality services to you.

## **8. Concerns about Privacy**

If you believe we have breached our Privacy Policy please contact us at [alison@audit-me.com.au](mailto:alison@audit-me.com.au).

We take complaints very seriously and will respond shortly after receiving written notice of your complaint.

## **9. Changes**

Please be aware that we may change this Privacy Policy in the future. The revised versions will be uploaded onto our website, so please check back from time to time.

## **10. Website**

When you visit our website we may collect certain information such as browser type, operating system, website visited immediately before coming to our site. This information is used in an aggregated manner to analyse how people use our site, so we can improve our service.

Our site has links to other websites not owned or controlled by us. We are not responsible for these sites or for the consequences of your access to those sites.

### **Effective Date**

The Privacy Policy is effective 1 March 2023