

## Privacy Policy

On 21 December 2001, the new Privacy Amendment (Private Sector) Act 2000 came into force, regulating the way personal information is handled by private sector organizations.

McBurneys respects your privacy and following are the steps we intend to take towards protecting your privacy whilst complying with Government regulations.

McBurneys has created this Privacy Policy and Collection Statement (together referred to as "this Privacy Policy") in order to demonstrate its firm commitment to privacy.

McBurneys is bound by the Privacy Act and the Australian Privacy Principles APPs.

McBurneys will update this privacy policy as required. If it is changed, the changes will be posted on our website ([www.mcburney.com.au](http://www.mcburney.com.au)) so that you are always aware of the sort of information collected, how the information may be used, and under what circumstances it may be disclosed by McBurneys.

Please note that if at any time McBurneys is required by law to release information about you or your organization McBurneys must cooperate fully.

### What sort of information does McBurneys collect?

Personal information collected from you by McBurneys may include your name, date of birth, tax file number, current and previous addresses, telephone/mobile phone numbers, e-mail address, bank account(s) details, occupation, marital status, private medical benefit fund status and previous Accountant's name and address.

McBurneys collects information about you in several different ways such as directly from you in meetings, provided by you over the phone in written communications from you or from documents you or a third party (which you have authorised) have provided to McBurneys.

Help us to maintain accurate records by letting us know if there are any errors in your personal information in documents provided to you prepared by McBurneys and keep us informed of any changes to your personal information.

McBurneys collects information when you engage us (and from time to time as required) so that McBurneys may provide you with services such as financial planning, tax, audit, accounting, or other services.

McBurneys also uses the Information to send you information (either by e-mail or post) that you request. If at any time you receive material that you did not request or do not want to receive such material any more, see "Correcting and Updating Your Information" below.

### Who does McBurneys disclose personal information to?

We use a variety of software companies, including cloud-based providers, to assist in providing you with our services. Your data may be stored with some of these providers. We only select the most reputable software providers that are mainstream within the Australian accounting industry.

Our major software providers include but are not limited to; AnyDesk, CAS 360, Class Super, Fusedocs, HowNow, Xero, MYOB, Quickbooks, Reckon, Microsoft 365 and others as may vary from time to time.

McBurneys engages third-party service providers to assist us in delivering our service commitments. Our office is satisfied those third parties meet all Australian Privacy Law obligations as set out under the Privacy Act 1988 (Cth) and the Australian Privacy Principles (APP standards).

These service providers include but are not limited to; Act2 Solutions Pty Ltd (Actuarial certificate services - Tasmania), 1300 Apprentice Sydney (Administration Services - Sydney), Seamless SMSF and Seamless Outsourcing (data entry, accounting, taxation and SMSF audit - Geelong and Ho Chi Minh City), ACIS (Corporate documents and entity incorporations - Sydney), Knowledge Shop (Tax research - Sydney), and others as may vary from time to time.

Our primary data storage facility is located in Sydney, but it may be replicated to other locations.

We also use the latest software technologies that feature cloud computing, which may be used to provide our services.

The providers of this storage have privacy policies that are consistent with the Australian Privacy Principles.

McBurneys may be required, from time to time, to release information to third parties such as the Australian Taxation Office, Government bodies, and financial institutions and if this is required, we will seek your permission to release such information.

McBurneys develops reports which incorporate some of the Information. The reports are for use internally.

#### How will McBurneys keep your personal information secure?

McBurneys has security measures designed to protect against the loss, misuse and/or alteration of the Information under its control. All personal information is filed/stored in areas with restricted access.

#### Correcting & Updating your Information

McBurneys gives you the following options for accessing and modifying Information previously provided:

- a. You may gain access to Information that McBurneys has collected about you, by contacting us. We will not charge you for responding to such a request unless we incur costs in providing the information.
- b. You can advise us of corrections or updates of personal information by telephone (+612 9230 0808) or e-mail ([mail@mcburney.com.au](mailto:mail@mcburney.com.au)) or in writing to the address below.



If you have any questions about this Privacy Policy, you should contact us

McBurneys  
Level 10  
68 Pitt Street  
SYDNEY NSW 2000

Phone: +612 9230 0808  
Facsimile: +612 9230 0807  
E-mail: [mail@mcburney.com.au](mailto:mail@mcburney.com.au)