



## Data Protection and Privacy Policy

Craig Baker & Associates is committed to safeguarding the confidentiality of personal information collected. We have set out these principles so that you are aware of how we gather, update and distribute personal information. These principles compile with the Australian Privacy Principles under the Privacy Act 1998 (Cth) as amended.

Craig Baker & Associates only collects information that we feel is relevant to perform the activities necessary to pursue our duties, comply with legal requirements and maintain ourselves as a professional accounting practice. The nature of this information will vary according to your relationship with us and the work we are performing. Our objective is not to hold information about you that is not required to be held.

Upon written request to us, assuming there are no legal reasons preventing us from doing so, Craig Baker & Associates will provide you with details of all personal information that we hold about you within a reasonable timeframe. You will be able to review this information and advise us of any amendments to the data held and may request us to delete any information.

Craig Baker & Associates will not provide personal information to outside parties. We will only provide personal information to third parties where we are required to by law, where it is reasonable for us to do so in providing the best service to you (both within the company and via our relationship third parties), where you have expressly asked us to do so. At times we may use this information for direct mailing, emailing etc. purposes whereby we consider that the information supplied may be of benefit to you. We retain this information only for as long as necessary to fulfil our provision of services to you and to comply with any legal requirements.

Our files may be subject to review as part of our quality control review program of the Institute of Public Accountants, which monitors compliance with professional standards by its members. We advise that if requested our files will be made available under this program.

In instances whereby we need to share information with others, in order to effectively provide our services, information that you provide may be used by other firms. Any personal information sent overseas will be subject to privacy legislation with the respective countries.

We use the best security available to use within our means so that reasonable steps are taken to protect the information we hold. This information is subject to change and updates will be place on our website periodically.

### *Introduction*

Craig Baker & Associates is committed to safeguarding the confidentiality of personal information collected. This Privacy Policy 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. This Privacy Policy also sets our general practices and principles that apply to information we collect through the following products and services:

- ❖ Our online and software tax preparation products and services;
- ❖ Our website; and
- ❖ Any other applications that incorporate this Privacy Policy.

If you have any question relating to this Privacy Policy, please do not hesitate to contact us.

### *Who does the data protection and privacy policy cover?*

This policy applies to any person or business for which we currently hold, or may in the future collect information.

### *Collecting of information*

Our usual approach is to collect personal or business information directly from you. We collect information you voluntarily provide as part of using or requesting our services.

We may also collect information in other ways which may include:

- ❖ from government bodies e.g. Australian Taxation Office (ATO) or the Australian Securities and Investment Commission (ASIC);
- ❖ through referrals from individuals or other entities;
- ❖ from paid search providers;
- ❖ from other professional association of which we are a member of.

### *Information We Collect*

We collect information, including personal information, about you, your spouse, your dependents, your business, and other individuals (such as 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, and email address);
- ❖ Demographic Information;
- ❖ Tax File Numbers and other government identification numbers;
- ❖ Dates of Birth;
- ❖ Geo-Location Information;
- ❖ Financial Information (e.g., income, revenue, assets, credits, deductions, expenses and bank account information);
- ❖ Payment Data (e.g. checking, debit and credit card account numbers, balances and payment history);
- ❖ Website, Mobile Application, and Email Usage Data; and
- ❖ Login Information.

### *Our use of your personal information*

Craig Baker may use personal information collected from you to provide you with information, updates and our services. We may also make you aware of new and additional products, services and opportunities available to you. We may use your personal information to improve our products and services and better understand your needs. Craig Baker may contact you by a variety of methods including, but not limited to telephone, email, sms or mail.

### *Disclosure of your personal information*

We may disclose your personal information to any of our employees, officers, insurers, professional advisers, agents, suppliers or subcontractors insofar as reasonably necessary for the purposes set out in this Policy. Personal information is only supplied to a third party when it is required for the delivery of our services.

We may from time to time need to disclose personal information to comply with a legal requirement, such as a law, regulation, court order, subpoena, warrant, in the course of a legal proceeding or in response to a law enforcement agency request or to any person with your consent

We may also use your personal information to protect the copyright, trademarks, legal rights, property or safety of Craig Baker and Associates, its customers or third parties.

Information that we collect may from time to time be stored, processed in or transferred between parties located in countries outside of Australia.

If there is a change of control in our business or a sale or transfer of business assets, we reserve the right to transfer to the extent permissible at law our user databases, together with any personal information and non-personal information contained in those databases. This information may be disclosed to a potential purchaser under an agreement to maintain confidentiality. We would seek to only disclose information in good faith and where required by any of the above circumstances.

By providing us with personal information, you consent to the terms of this Privacy Policy and the types of disclosure covered by this Policy. Where we disclose your personal information to third parties, we will request that the third party follow this Policy regarding handling your personal information.

### *Security of your personal information*

Craig Baker is committed to ensuring that the information you provide to us is secure. 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.

### *How to access and update your personal information*

You have a right to access your personal information and you may access and / or request that your personal information be edited or corrected by contacting our office:

- ❖ Email: [admin@craigbaker.com.au](mailto:admin@craigbaker.com.au)
- ❖ In writing: Craig Baker & Associates, PO Box 22, Runaway Bay, QLD, 4216
- ❖ Phone: 07 5537 7700

By informing us of any changes to your personal information, you allow us to ensure that your information is accurate, up-to-date and complete.

### *How Long Do We Keep Your Information*

We keep your information for as long as needed or as required by law.

We retain your information for as long as your account is active or as needed to provide you services. We may retain or use your information as necessary to comply with our policies, legal obligations, resolve disputes, and enforce our agreements.

### *Privacy complaint*

If you have any complaints about our privacy practices, please feel free to send in details of your complaint to:

- ❖ Email: [admin@craigbaker.com.au](mailto:admin@craigbaker.com.au)
- ❖ In writing: Craig Baker & Associates, PO Box 22, Runaway Bay, QLD, 4216
- ❖ Phone: 07 5537 7700

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

### *Website*

When you visit our website When you come to our website [www.craigbaker.com.au](http://www.craigbaker.com.au) we may collect certain information such as browser type, operating system, website visited immediately before coming to our site, etc. This information may be used in an aggregated manner to analyse how people use our site.

Our website may from time to time use cookies to analyses website traffic and help us provide a better website visitor experience. In addition, cookies may be used to serve relevant ads to website visitors through third party services such as Google Adwords. These ads may appear on this website or other websites you visit.

#### Third party sites

Our site may from time to time have links to other websites not owned or controlled by us. These links are meant for your convenience only. Links to third party websites do not constitute sponsorship or endorsement or approval of these websites. Please be aware that Craig Baker is not responsible for the privacy practises of other such websites. We encourage our users to be aware, when they leave our website, to read the privacy statements of each and every website that collects personal identifiable information.

### *Changes to this Privacy Policy*

Craig Baker & Associates welcomes your comments regarding this Privacy Policy. Please be aware that we modify this Policy at any time, in our sole discretion and all modifications will be effective immediately upon our posting of the modifications on our website. Please check back from time to time to review our Privacy Policy. You can also get a copy of the most current version of this Policy by either emailing or writing to our office using the contact details set out in this document

## Procedure for a data breach

