



Forbes Accounting & Business Consultants Pty Ltd

As The Trustee for Forbes Accounting & Business Consultants

Accountants, Tax Agents & Business Advisers

Privacy Policy

Forbes Accounting and Business Consultants (FABC) is committed to providing quality services to you and this policy outlines our ongoing obligations to you in respect of how we manage your Personal Information. We have adopted the Australian Privacy Principles (APPs) contained in the Privacy Act 1988 (Cth) (the Privacy Act) and explains how your personal information will be managed when dealing with our firm.

What personal information do we collect?

Personal information that FABC may collect includes:

- Name, address, phone number, email address, and other contact details
- Your tax file number, identification documents including Photo ID, financial records, bank account details, and other information relevant to your tax affairs
- Your employment details, income, expenses, assets, liabilities, and other information relevant to your financial situation and goals
- Other personal information you provide to FABC when you participate in promotion, survey, feedback, or preferences regarding our services

We may also collect sensitive information from you with your consent or as required by law. This may include:

- Your health information, such as medical conditions or disabilities that may affect your tax obligations or entitlements
- Your membership in a professional or trade association or trade union that may affect your tax obligations or entitlements
- Your racial or ethnic origin, religious beliefs or affiliations, sexual orientation or practices, or criminal record that may affect your tax obligations or entitlements

Forbes Accounting & Business Consultants Pty Ltd
as The Trustee for Forbes Accounting & Business Consultants (ABN: 25 464 338 674)
Office: Level 1, 5 Belmore Street, Burwood NSW – 2134
Mail: PO Box 1213, Burwood, NSW 1805
☎: 02 8095 9405 Fax: 02 8004 8156
✉: info@fabc.com.au Website: www.fabc.com.au

“Liability Limited by scheme approved under professional standard legislation”

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How do we collect your personal information?

FABC collects personal information directly from you when you:

- Fill out forms or provide documents
- Use our online platforms or applications
- Contact us by phone, email, or in person
- Participate in our surveys, promotions, or events

We may also collect personal information from third parties, such as:

- The Australian Taxation Office or other government agencies
- Your employer, bank, superannuation fund, or other financial institution
- Your accountant, lawyer, financial planner, or other professional adviser
- Your referees or other persons who can verify your identity or information

For what purpose do we collect your personal information?

FABC collects personal information that is reasonably necessary for us to provide you with our accounting and business services to fulfill our contractual obligations to you.

We may also collect personal information for the following purposes:

- To comply with our legal obligations under the taxation laws and other applicable relevant laws and regulations
- To communicate with you in relation to our services and respond to your inquiries or complaints



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- To market our services to you and inform you of our offers and events that may be of interest to you

How might we use and disclose your personal information?

FABC may use or disclose your personal information for the purpose of providing accounting and business services and for other related purposes that you would reasonably expect. This may include:

- Preparing and lodging your tax returns and other documents with the Australian Taxation Office or other government agencies
- Providing you with advice and assistance on your tax affairs and financial affairs
- Processing your payments and issuing invoices and receipts
- Maintaining our records and accounts
- Managing our relationship with you and providing you with ongoing support
- Conducting audits, quality assurance, risk management, and dispute resolution activities
- Engaging third parties to assist us in providing our services to you, such as other accounting firms, software providers, regulators, auditors, etc.
- Protecting our rights and interests and enforcing our terms and conditions

As FABC is an international practice, FABC may also share and disclose your personal information with its overseas staff and associates to process miscellaneous assignments.

FABC will not use or disclose your personal information for any other purpose without your consent or as required or authorised by law.

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How can you access and correct personal information?

FABC acknowledges that individuals have a general right of access to information concerning them, and to have inaccurate information corrected. Access to information is subject to client confidentiality.

Subject to client confidentiality, you are able to request access to your personal information by contacting us using the details below. We will respond to your request within a reasonable time and in accordance with the law. We may charge a reasonable fee for providing access to your personal information. If access is refused to your information, FABC will give you a notice explaining our decision to the extent practicable and your options.

FABC disregards information that seems likely to be inaccurate or out-of-date by reason of the time that has elapsed since it was collected or by reason of any other information in its possession.

Is your personal information secure?

FABC takes reasonable measures to ensure that your personal information is kept confidential and secure from unauthorised access, use, modification, or disclosure by restricting access to the information through:

- Using encryption, passwords, firewalls, and other security measures to safeguard our online platforms and applications
- Storing your personal information in secure premises and locking cabinets
- Restricting access to your personal information to our staff and contractors who need it to perform their duties
- Providing training and guidance to our staff and contractors on how to handle your personal information appropriately

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- Destroying or de-identifying your personal information when it is no longer needed

Dealing with unsolicited information

FABC takes all reasonable steps to ensure that all unsolicited information is destroyed immediately.

Is your personal information sent overseas?

FABC has its associated accounting practices in various countries along with back-office processing team in India. We may share and disclose your personal information with our overseas team and associates to assist us in providing our services. Your information is saved on:

- Cloud based software's used by Australian Accounting firms
- Cloud based document management system available in Australia
- Emails registered under our domain "FABC.COM.AU".

Our overseas team can access the information by using their authorized logins at above platforms.

How to Access and correct your personal information

FABC endeavours to keep your personal information safe. If you wish to make a request to access and/ or correct your personal information we hold, you can make a request by contacting us.

Complaints and disputes

If you have a reason to believe FABC has not complied with its obligations relating to your personal information under this privacy policy or under the Privacy Act 1988 (Cth), please contact us by using any of the methods mentioned below.

FABC will ensure your complaint is handled in an appropriate and reasonable time and manner. A notice of our decision regarding your complaint will be provided to you.



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Contact

Please refer any queries about Forbes Accounting & Business Consultants Pty Ltd and privacy issues to the following details:

Forbes Accounting & Business Consultants Pty Ltd

Tel: 1300 728 396, 02 8095 9405

Fax: 02 8004 8156

Email: info@fabc.com.au or CRM@fabc.com.au

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