

Privacy Policy.

Envy Accounts respects your privacy and is committed to protecting the confidentiality and privacy of personal information. Envy Accounts collects and handles your personal information in accordance with its legal obligations, including those under the Privacy Act 1988 (Cth), the Australian Privacy Principles, and other relevant law.

In this Privacy Policy, ‘we’, ‘us’ refers to Envy Accounts.

We may need to update this Privacy Policy from time to time to reflect our current privacy practices or changes in the law, regulations and/or professional standards. When we make any changes to this Privacy Policy we will post the updated policy on our website.

Personal Information

We collect personal information from several sources including:

- Directly from you or your authorised representative
- When you use our services, including our online services
- From outside sources or third-party where you have provided consent or where the collection of your information is permitted by law.

Examples of personal information we may collect include:

- General identification information such as names, job title, occupation, date of birth, place of birth, gender
- Government Issued numbers including tax file number, Australian business number, Director Identification number
- Contact details such as address, email address, phone
- Financial information including bank account details, superannuation details, shareholdings and details of investments
- Expenditure information

While we are required to collect some types of personal information, we do attempt to keep our collection of your personal information to what is necessary to offer you the services you require. You may need to provide personal information about other entities (which include details of the above relating to spouse, dependents, employees). If so, we rely on you to have informed those individuals that you are giving their personal information to us, to have advised them of this Privacy Policy and how they can obtain a copy of it and that you have the necessary authority to provide that personal information to us.

It is important to be aware that if you access a third-party services using our services that you read and understand that entities Privacy Policy.

Collecting Personal Information

We collect your personal information from you directly when:

- We deal with you verbally
- You send us correspondence



- You complete a questionnaire, form or survey
- You provide authorisation for us to view your bank transaction
- Social media and networking sites if your posts, activities and/or profile information are public
- From your business social media and websites

When you enter or upload your data into our services, we don't own that data, but you grant us a license to use, copy, transmit, store, analyse and back up all data you submit.

We will collect your information from government sources such as the Australian Taxation Office.

Sometimes we will collect your personal information from third parties in circumstances when you have linked those parties to our services.

Holding and Protecting Personal Information

We store information electronically. We also engage in third parties to host electronic data on our behalf. Protecting your personal information matters to us, and while we have taken steps to help protect your data, no method of electronic storage is completely secure, and we cannot guarantee its security. We may notify you if we have reason to believe that someone has accessed your account without authorization.

We take all reasonable steps to secure and protect your information including:

- Security measures to control access to our systems
- Ensuring third parties engaged by us comply with our privacy standards
- Technology controls such as firewalls, the use of encryption, strong password utilisation, two factor authentication

When accessing our services and third-party services we strongly encourage you to use all extra security features to protect your data.

We have no liability for the loss or corruption of your data, our liability will be limited to taking reasonable steps to try to recover that data from our available backups.

Purpose for collecting, holding, using and disclosing personal information

We only collect, use, hold and disclose personal information if we have your permission or are lawfully required to do so.

The reason we may collect, hold, use and disclose personal include:

- To provide our services to you in accordance with the terms of our engagement agreement
- For administration purposes including processing payments
- For governance and compliance purposes
- To maintain contact with, and keep you informed on information that may be of interest to you



- Where you are an employee, customer or contractor of our client we may disclose your personal information to government authorities as part of providing services to that client
- Where you have requested to receive information from us and are not a client of ours (which you are permitted to unsubscribe at any time as per the details provided in the emails sent to you with this information)

We do not disclose your personal to third parties for the purpose of allowing them to send marketing material to you.

Visiting our website and social media

Information is collected for analytical purposes for improving our services, or when you have agreed to provide information to us via our forms, questionnaires and surveys. You can tailor your experience with these technologies via the privacy and browser settings on your device or by rejecting associated cookies or not completing our forms, questionnaires or surveys.

Some of our websites and services may include functionality to share via third party social media applications, such as Facebook. These social media applications may collect and use information regarding your use of our website. Any personal information you may share via these applications may be collected and used by members of that social media application separate to us and are subject to the privacy policies of the relevant companies that provided the application. We do not have control over those companies or their use of your information.

Children

We understand the importance of protecting the privacy of children. The collection of data on your dependent children will only be done in circumstances where they are beneficiaries of Trusts and their name and date of birth is required. Or keep a general record for tax planning and dependent recording on your personal tax return where you are not required to disclose their name and their general living arrangement to us.

Accurate personal information

It is important that your information supplied is accurate and up to date. If any of the details change you can contact us, and we will take reasonable steps to correct it in accordance with the requirements of the Privacy Act.

Length of time we hold your information

Your information may be requested to be removed from our holding when you are no longer our client. However, if government authorities that were used to provide you with our services, require us to hold your information we will only hold that information that is required to be held and for the minimum duration it is required to be held. The government authorities that may impose this on us include the Australian Taxation Office, Australian Securities and Investment Commission, Tax Practitioners Board.



Further information

If you need more information, want to access or update your personal information or if you have a privacy concern, please contact us using the contact details or form located on our website.

Making a privacy compliant

You can notify us of any compliant you may have about our handling of your personal information. Following your initial contact, you will be asked to set out the details of your compliant in writing. If you are not happy with how we fix your complaint you can contact the Office of the Australian Information Commissioner if your compliant is about your privacy:

Website: oaic.gov.au

Email: enquiries@oaic.gov.au

Phone: 1300 363 992

Mail: GPO Box 5288, Sydney NSW 2001

