



S.J. ELLIS

ACCOUNTING SERVICES

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# Privacy Policy Manual

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S.J. Ellis Accounting Services  
is a CPA Practice

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## Privacy Policy Statement

SJ Ellis Accounting Services regards your privacy as a serious issue and we understand that it is important for you to know how we deal with your personal information.

From 21 December 2001 new Privacy Laws apply to how we collect, hold, use and disclose your personal information. SJ Ellis Accounting Services complies with the National Privacy Principles and is committed to protecting the privacy of your personal information.

The following Privacy Policy has been published to provide you with a clear and concise outline of:

- The types of personal and sensitive information that we collect and keep on record
- Our policy in relation to how we collect, hold, use and disclose your personal information
- Your privacy rights

### Types of personal information that we collect, use and hold

SJ Ellis Accounting Services collects and holds personal and sensitive information for the purposes of establishing and building tax and accounting services relationships with you or providing business appraisals. If you provide incomplete or inaccurate information we may not be able to provide the services or advice you are seeking. The personal information we collect includes:

- Information that identifies you, such as your name, address contact details and any other identification information provided by you, or people nominated by you.
- Depending on the type of services you are seeking we may also collect sensitive information about you. This information may comprise membership to professional or trade associations or philosophical beliefs, your professional background, training and experience.
- We collect information about you and your family including your business structures, beneficial ownership of business entities, investments which may include sensitive information.
- We collect Tax File Numbers which are sensitive information.

Personal Information about you is generally collected from you, unless you have consented to us obtaining information from a third party.

Where we collect information from you about another individual, such as your nominated beneficiary, it is important that you advise them of the disclosure and their Privacy rights.

The information we collect is used in the following manner:

- To prepare tax returns and financial accounts
- To prepare tax business activity statement
- To enable us to provide you with generic information which may be of interest or value to you
- To enable us to provide business appraisals and valuations
- To enable us to provide business advice
- To enable us to provide tax planning advice

### Disclosure of your Personal Information

Generally, your consent is obtained before we disclose your personal information to a third party. Your consent can be in writing, by telephone, or implied by your conduct. In some circumstances however we may be required by Law to disclose your personal information.

### Personal Information Quality

We try to ensure that your personal information is accurate, complete and up-to-date. To assist us with this please keep us advised of any of your personal details which may have altered.

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Further, if you believe that the information we have about you is not accurate, complete or up-to-date, please contact us and we will use all reasonable efforts to correct the information. If we disagree as to the accuracy of the requested correction we will make an appropriate notation in your records that you claim the information we hold is not accurate, complete or up-to-date.

### **Personal Information Security**

We take all reasonable administrative, technical, and physical safeguards to protect your personal information from misuse, loss, unauthorised access, alteration or disclosure.

Secure methods are used to destroy or de-identify any personal information, provided the information is no longer needed for any purpose and it is permissible by the law to do so.

### **Access to Personal Information**

You can request us at any time to provide you with access to the personal information we hold about you. Under some circumstances we may not be required to provide access to you and in such cases a written explanation will be given to you.

Access to your information will be provided on receipt of an Application for Access and will generally be processed within 14 days. More time may be required for more complex requests. We may charge you the reasonable costs of processing your request.

### **Marketing and Promotional Material**

We acknowledge and respect your right to choose to opt-out of receiving information about products and services supplied by us, or by others, which we think may be of interest to you.

Should you decide not to receive marketing or promotional material from us you can opt-out at any time by advising us in writing or contacting us by telephone

### **Privacy Policies of Other Parties**

Many of the product and services providers you may deal with through your relationship with SJ Ellis Accounting Services will also have Privacy Policies concerning the manner in which they collect, hold, use or disclose personal information. These Policies can generally be accessed view the provider's web site or will be made available to you upon request to them.

### **Changes to this Statement**

SJ Ellis Accounting Services may make changes to our Privacy Policy from time to time. We will publish those changes on our web site. This Privacy Policy was last amended on 15th April, 2023.

### **Contacting us about Privacy**

If you would like further information regarding our Privacy Policy, or if you think we have breached any aspect of this Privacy Statement, please contact us as follows:

By telephone on 0413 977 655 between 9.00am and 5.00pm Monday to Friday:

In writing to the address below:

Steve Ellis  
SJ Ellis Accounting Services  
PO Box 849  
Elanora Qld 4221