



## Privacy Policy

**Canning Tax & Advisory Pty Ltd** is committed to protecting your privacy and the confidentiality of your personal information. This Privacy Policy explains how we collect, use, store and disclose your personal information in accordance with the **Privacy Act 1988 (Cth)** and the **Australian Privacy Principles (APPs)**.

A copy of the APPs can be obtained from the Office of the Australian Information Commissioner (OAIC) at [www.oaic.gov.au](http://www.oaic.gov.au).

### What is Personal Information and why do we collect it?

Personal information is information or an opinion about an identified individual or an individual who is reasonably identifiable.

This includes (but is not limited to):

- Name
- Address
- Email address
- Telephone number
- Date of birth
- Tax file number
- Bank details
- Business and financial records
- Superannuation and payroll information

We collect personal information that is reasonably necessary for us to provide accounting, tax and advisory services. This may include:

- Identity and contact details
- Financial and taxation information
- Business records
- Employee and payroll data
- Superannuation details
- Trust and company information
- Correspondence and meeting notes

We may also collect information through:

- Our website <https://canta.com.au>
- Client portals and cloud software
- Email and phone communications
- Meetings
- Online forms
- Marketing platforms

- Third-party data sources such as the ATO, ASIC, banks, financial institutions, bookkeepers and legal advisers

We collect, hold and use your personal information to:

- Provide accounting, tax and advisory services
- Prepare and lodge tax returns, BAS and other compliance documents
- Communicate with you
- Provide strategic and financial advice
- Manage billing and payments
- Meet our legal and regulatory obligations
- Improve our services
- Send relevant updates, newsletters and marketing communications

You may opt out of marketing communications at any time.

### Sensitive Information

Sensitive information includes information about health, criminal records, political beliefs, trade union membership and similar matters.

We only collect sensitive information where it is necessary for our services or required by law and it will only be used:

- For the primary purpose for which it was collected
- For a directly related purpose
- With your consent
- Where required or authorised by law

### Third Parties

Where reasonable and practicable, we collect personal information directly from you. However, we may also collect it from third parties including:

- The Australian Taxation Office
- ASIC



T (07) 4580 0733 | E [admin@canta.com.au](mailto:admin@canta.com.au) | W <https://canta.com.au>  
A Suite 5 / 109 HERRIES STREET EAST TOOWOOMBA QLD 4350  
P PO Box 7012 TOOWOOMBA SOUTH QLD 4350



- Banks and lenders
- Superannuation funds
- Payroll providers
- Bookkeepers
- Solicitors
- Other professional advisers
- Cloud accounting platforms (such as Xero, MYOB and similar)

### **Disclosure of Personal Information**

We may disclose your personal information to:

- The ATO, ASIC and other regulators
- Banks, lenders and financiers
- Superannuation funds
- Software and cloud service providers
- Professional advisers such as lawyers and financial planners
- Contractors and service providers who support our business
- Anyone you authorise us to deal with

We only disclose information where it is necessary to provide our services or required by law.

Some of our software providers store data outside Australia. Where this occurs, we take reasonable steps to ensure those providers comply with Australian privacy standards.

### **Security of Personal Information**

We store personal information using secure cloud-based and physical systems designed to protect it from:

- Misuse
- Loss
- Unauthorised access
- Modification
- Disclosure

We use secure servers, encryption, access controls, backups and industry-standard security measures.

We retain client records for at least **7 years** or longer where required by law or professional standards. When information is no longer required, it is securely destroyed or de-identified.

### **Access to your Personal Information**

You may request access to the personal information we hold about you and request corrections if it is inaccurate, incomplete or out of date.

To make a request, please contact us in writing. We may require proof of identity before releasing information. We do not charge for access requests but may charge reasonable administrative costs for providing copies.

### **Maintaining the Quality of your Personal Information**

It is an important to us that your Personal Information is up to date. We will take reasonable steps to make sure that your Personal Information is accurate, complete and up to date. If you find that the information we have is not up to date or is inaccurate, please advise us as soon as practicable so we can update our records and ensure we can continue to provide quality services to you.

### **Cookies and Website Data**

Our website may use cookies and tracking technologies to improve user experience, monitor traffic and assist with marketing. You can disable cookies through your browser settings.

### **Policy Updates**

This Policy may change from time to time and is available on our website.

### **Privacy Policy Complaints and Enquiries**

If you have any queries or complaints about our Privacy Policy, please contact us at:

Canning Tax & Advisory  
 admin@canta.com.au  
 07 4580 0733

If you are not satisfied with our response, you may lodge a complaint with the **Office of the Australian Information Commissioner (OAIC)**.