

EDGEWORTH PARTNERS PTY LTD

ABN 90 080 146 845

PRIVACY POLICY

Edgeworth Partners Pty Ltd (ABN 90 080 146 845) (“we”, “us” or “the Business”) is committed to protecting the privacy of personal information we hold. This Privacy Policy explains how we collect, hold, use and disclose personal information, and how you can access or correct that information, or make a complaint, in accordance with the Privacy Act 1988 (Cth) and the Australian Privacy Principles (APPs).

1. What personal information we collect

In the course of providing accounting, taxation, bookkeeping and related business advisory services, we may collect personal information including:

- Your name, contact details and date of birth;
- Your Tax File Number and Australian Business Number (where applicable);
- Financial information, including income, assets, liabilities, and business records;
- Employment and business information; and
- Other information reasonably necessary to provide our services or required by law.

2. How we collect personal information

We generally collect personal information directly from you, including through engagement forms, meetings, telephone calls, email, and our client portal and practice management systems. We may also collect personal information from third parties, such as the Australian Taxation Office, other government agencies, or other professional advisers you have engaged, where you have authorised this or where it is otherwise permitted by law.

3. Why we collect, hold and use personal information

We collect, hold and use personal information for the purposes of:

- Providing accounting, taxation and business advisory services to you;
- Complying with our obligations as a registered tax agent and under taxation and other law;
- Administering and managing our relationship with you, including billing; and
- Any other purpose for which the information was collected, or to which you have consented.

We are required by law to collect certain information, such as your Tax File Number, in order to prepare and lodge tax returns and related documents on your behalf. If you do not provide the information we request, we may be unable to provide some or all of our services to you.

4. Who we may disclose personal information to

We may disclose your personal information to:

- The Australian Taxation Office and other relevant government or regulatory agencies;
- Other professional advisers you have engaged or authorised us to liaise with;
- Our service providers, including cloud-based practice management, accounting and communication platforms used to deliver our services to you; and
- A prospective purchaser of the Business and its advisers, for the purpose of conducting due diligence in connection with a proposed sale of the Business. Any such disclosure is made on a confidential basis, and it is a condition of that disclosure that the information is not used or disclosed for any other purpose. If the sale of the Business proceeds, your personal information may be transferred to the purchaser, and you will be notified of this.

Some of the cloud-based service providers we use may store information on servers located outside Australia. We take reasonable steps to ensure any such provider handles personal information in a manner consistent with the Australian Privacy Principles.

We will not otherwise use or disclose your personal information for a purpose other than the purpose for which it was collected, unless you have consented, or the use or disclosure is otherwise permitted or required by law.

5. Data quality

We take reasonable steps to ensure the personal information we collect, hold, use and disclose is accurate, complete and up to date, including by asking you to review and confirm your details at the commencement of each engagement and prior to the lodgement of returns or other documents prepared on your behalf.

6. Data security

Personal information is held electronically in secure, access-controlled practice management and accounting systems. Access to these systems is restricted to authorised personnel and protected by passwords and other access controls. We take reasonable steps to protect personal information from misuse, interference, loss, and unauthorised access, modification or disclosure.

7. Retention and destruction

We retain personal information for as long as is necessary to provide our services and to comply with our legal and regulatory record-keeping obligations, which generally require records to be retained for a minimum of five years. Once personal information is no longer required for any purpose for which it may be used or disclosed, and we are not required by law to retain it, we will take reasonable steps to securely destroy or permanently de-identify that information.

8. Access and correction

You may request access to the personal information we hold about you, or request that it be corrected if it is inaccurate, incomplete or out of date, by contacting us using the details below. We will respond to your request within a reasonable time. In some circumstances permitted by law, we may need to refuse a request for access, in which case we will provide you with reasons for that refusal.

9. Complaints

If you have a concern about how we have handled your personal information, please contact our Privacy Officer using the details below. We will investigate your complaint and aim to respond within a reasonable time. If you are not satisfied with our response, you may refer your complaint to the Office of the Australian Information Commissioner (OAIC) at www.oaic.gov.au.

10. Changes to this policy

We may update this Privacy Policy from time to time. The most current version will be published on our website.

Contact us

Privacy Officer

Edgeworth Partners Pty Ltd

Level 1, Suite 1, 22-28 Edgeworth David Avenue, Hornsby NSW 2077

Phone: 02 9476 6700

Email: partner@edgeworthpartners.com.au

This policy was last updated in June 2026.