

Privacy Policy

1. Purpose

Boots and Balance Bookkeeping is committed to protecting your privacy and handling your personal information in accordance with the Privacy Act 1988 (Cth).

This Privacy Policy explains how we collect, use, store, and disclose your personal information when providing bookkeeping and BAS services.

2. What Information We Collect

We may collect personal and business information including:

- Name, address, phone number, and email address
- Business details such as ABN, entity structure, and financial information
- Taxation and payroll information
- Bank account and transaction information
- Employee and contractor details (where applicable)

3. How We Collect Information

We collect information directly from you when you:

- Complete onboarding forms
- Provide financial records or documentation
- Communicate with us via email, phone, or other means

We may also collect information from third parties where authorised, including:

- Your accountant
- Accounting software providers (such as MYOB or Xero)
- The Australian Taxation Office

4. Why We Collect Your Information

We collect and use your information to:

- Provide bookkeeping and BAS services
- Prepare and lodge BAS and other reports
- Communicate with you about your accounts
- Comply with legal and regulatory obligations

5. Disclosure of Information

We may disclose your information where necessary to:

- The Australian Taxation Office
- Your authorised accountant or financial adviser
- Software providers used to deliver our services
- Government agencies as required by law

We do not sell or rent your personal information to third parties.

6. Storage and Security

We take reasonable steps to protect your information from misuse, interference, loss, unauthorised access, modification, or disclosure.

Your information may be stored:

- Electronically in secure cloud-based systems
- In password-protected files and software
- In limited physical records where required

7. Access and Correction

You may request access to the personal information we hold about you and request corrections if it is inaccurate.

Requests can be made by contacting us using the details below.

8. Retention of Information

We retain records in accordance with legal and regulatory requirements, including obligations under taxation law (generally a minimum of five years).

9. Complaints

If you have a complaint about how your personal information has been handled, please contact us.

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

10. Contact Us

If you have any questions about this Privacy Policy or how your information is handled, please contact:

Boots and Balance Bookkeeping
Email: admin@bootsandbalance.com.au
Phone: 0437 822 253

11. Updates to This Policy

We may update this Privacy Policy from time to time. The latest version will always be available on our website.