



Privacy Policy

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Trading As - Total Balance Bookkeeping AU (TBBAU)

Total Balance Bookkeeping AU ("TBBAU," "we," "us," or "our") respects your privacy and is committed to protecting your personal information according to our obligations under the Privacy Act 1988 (Cth) ("Privacy Act") and the Australian Privacy Principles. This Privacy Policy outlines how we collect, use, disclose, and safeguard your information when you engage our bookkeeping services.

We manage personal information in an open and transparent way. This includes having a clearly expressed and up-to-date Privacy Policy on our website.

Where possible, we allow individuals to interact with us anonymously or using a pseudonym, except where it is impractical or required by law to identify an individual.

1. Collection of Personal Information

We may collect personal information necessary to provide our bookkeeping services, including but not limited to:

- Full name, business name, TFN & ABN
- Contact details (address, phone number, email)
- Financial records, invoices, bank statements, and taxation details
- Other relevant business and financial information.

We collect this information directly from you or from third parties with your consent, such as accountants, financial institutions, and the Australian Taxation Office (ATO). We ensure that we only collect information necessary for our services.

When we collect personal information, we take reasonable steps to notify you of:

- The purpose of collection
- How the information will be used and disclosed
- How you can access and correct the information
- How you can make a complaint
- Other relevant business and financial information.

2. Use of Personal Information

We use the information collected to:

- Provide bookkeeping and financial services
- Prepare financial reports and manage accounts
- Assist with BAS, GST, and other taxation matters
- Communicate with you regarding your bookkeeping needs
- Comply with legal obligations and industry regulations.

We do not use or disclose personal information for purposes other than those stated, unless required by law or with your consent.

We do not use your personal information for direct marketing purposes unless you have provided explicit consent.

You can opt out of receiving marketing communications at any time.

3. Disclosure of Personal Information

We may disclose your personal information to:

- Accountants, tax agents, and financial advisors (with your consent)
- Regulatory bodies such as the ATO or ASIC when required by law
- Cloud-based accounting software providers (e.g., Xero, MYOB, QuickBooks) for bookkeeping purposes
- Any other third parties where disclosure is required to provide our services or comply with legal obligations.

We will never sell or rent your personal information to third parties. If we transfer personal information to a recipient outside Australia, we will take reasonable steps to ensure that the recipient complies with APPS or similar levels of privacy protection.

We do not adopt, use, or disclose government related identifiers (such as tax file numbers) unless required by law.

We take reasonable steps to ensure that the personal information we collect, use or disclose is accurate, up to date, complete and relevant.

4. Data Security

We take reasonable precautions to protect your personal information from unauthorized access, misuse, or loss. This includes:

- Secure storage of digital and physical records
- Password-protected accounting software
- Confidentiality agreements with staff and contractors.

If we no longer need your information, we will take reasonable steps to securely destroy or de-identify it.

5. Access and Correction

You have the right to:

- Request access to your personal information
- Ask us to correct any inaccurate or outdated information.

To make a request, please contact us using the details provided below.

6. Cookies and Website Usage

Our website may use cookies to improve user experience and track site traffic. You can modify your browser settings to refuse cookies if you prefer.

7. Changes to This Privacy Policy

We may update this Privacy Policy from time to time to reflect changes in laws or business practices in compliance with the Privacy Act and the Australian Privacy Principles. The latest version will always be available on our website.

8. Contact Information

If you have any questions about this Privacy Policy or wish to access or update your personal information, please contact us:

Total Balance Bookkeeping AU (TBBAU)

ABN 11 371 593 287

Email: admin@totalbalancebookkeeping.com

Website: www.totalbalancebookkeeping.com

By using our services, you acknowledge that you have read and understood this Privacy Policy and consent to the collection, use, and disclosure of your personal information as outlined above.

Last Updated: 1st October 2024