

Privacy Policy

Last Updated: 29th July 2026

Privacy Policy

Aylward & Hudson Pty Ltd ("we", "us", "our") is committed to protecting your privacy and handling your personal information in accordance with the **Privacy Act 1988 (Cth)** and the **Australian Privacy Principles (APPs)**.

This Privacy Policy explains how we collect, use, disclose, store and protect your personal information.

1. What personal information we collect

The personal information we collect depends on the services we provide and may include:

- Name
- Residential and postal address
- Email address
- Telephone number
- Date of birth
- Tax File Number (TFN)
- Australian Business Number (ABN)
- Australian Company Number (ACN)
- Bank account details
- Identification documents (such as driver's licence or passport)
- Superannuation information
- Financial information
- Employment information
- Business records
- Trust, company and SMSF information
- Information required to comply with Anti-Money Laundering and Counter-Terrorism Financing (AML/CTF) legislation
- Any other information relevant to providing our professional services.

Where required by law, we may collect sensitive information only with your consent or where otherwise authorised by law.

2. How we collect personal information

We generally collect personal information directly from you, including when you:

- engage us to provide professional services;
- complete client information forms;
- provide documents electronically or in person;

- communicate with us by phone, email or video conference;
- use our website or client portal; or
- correspond with us in any other way.

We may also collect information from third parties where authorised by you or permitted by law, including:

- the Australian Taxation Office;
- ASIC;
- banks and financial institutions;
- superannuation funds;
- payroll providers;
- bookkeeping providers;
- legal advisers;
- financial advisers;
- government agencies;
- your employer;
- other accountants or advisers.

3. Why we collect personal information

We collect, hold and use your personal information to:

- provide accounting, taxation and business advisory services;
- prepare taxation returns and activity statements;
- prepare financial statements;
- establish companies, trusts and SMSFs;
- provide ASIC corporate secretarial services;
- comply with taxation, corporations, superannuation and AML/CTF legislation;
- communicate with you;
- verify your identity;
- manage our client relationship;
- issue invoices and receive payment;
- improve our services;
- comply with legal and regulatory obligations.

If you do not provide requested information, we may be unable to provide some or all of our services.

4. Disclosure of personal information

We may disclose your personal information where reasonably necessary to provide our services, including to:

- the Australian Taxation Office;
- ASIC;
- AUSTRAC where required by law;
- financial institutions;
- superannuation funds;

- software providers used in delivering our services;
- cloud storage providers;
- IT service providers;
- auditors;
- legal advisers;
- financial advisers (with your authority);
- contractors and consultants assisting us;
- debt collection agencies where necessary;
- courts, tribunals or government agencies where required by law.

We do not sell your personal information.

5. Overseas disclosure

Some of our technology providers may store or process information outside Australia.

Where this occurs, we take reasonable steps to ensure overseas recipients handle your personal information in a manner consistent with Australian privacy laws or are otherwise subject to comparable privacy protections.

6. Data security

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

Security measures include, where appropriate:

- encrypted electronic storage;
- secure cloud-based systems;
- password protection;
- multi-factor authentication;
- secure document portals;
- restricted staff access;
- regular software updates;
- cybersecurity monitoring;
- staff confidentiality obligations.

When information is no longer required, we securely destroy or de-identify it where permitted by law.

7. Retention of information

We retain personal information for as long as required to provide our services, comply with legal obligations, resolve disputes and enforce our agreements.

Certain taxation and accounting records must be retained for statutory periods under Australian law.

8. Access and correction

You may request access to the personal information we hold about you.

If you believe information is inaccurate, incomplete or out of date, you may request that we correct it.

Requests should be made using the contact details below.

We may refuse access in circumstances permitted by the Privacy Act.

9. Website information and cookies

Our website may use cookies and similar technologies to:

- improve website functionality;
- understand website usage;
- maintain website security;
- remember user preferences.

Most web browsers allow you to disable cookies, although some website functions may not operate correctly.

Our website may also collect technical information such as:

- IP address;
- browser type;
- operating system;
- pages viewed;
- date and time of access.

10. Marketing communications

We may occasionally send you newsletters, tax updates or information about our services.

You may opt out of receiving marketing communications at any time by contacting us or using the unsubscribe link included in electronic communications.

11. Government identifiers

We collect government identifiers, including Tax File Numbers, only where authorised or required by law and handle them in accordance with applicable legislation.

12. Notifiable Data Breaches

If an eligible data breach occurs involving your personal information, we will comply with the Notifiable Data Breaches scheme under the Privacy Act, including notifying affected

individuals and the Office of the Australian Information Commissioner (OAIC) where required.

13. Complaints

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

We will investigate your complaint and respond within a reasonable period.

If you are not satisfied with our response, you may contact the:

Office of the Australian Information Commissioner (OAIC)

Website: www.oaic.gov.au

Telephone: 1300 363 992

14. Contact us

Privacy Officer

Sharon Aylward

Address: 1 Loop Road, Ourimbah NSW 2258

Telephone: (02) 43623364

Email: sharon@ahaccountants.com.au

15. Changes to this Privacy Policy

We may update this Privacy Policy from time to time to reflect changes in legislation, technology or our business practices.

The latest version will always be available on our website and will take effect from the date it is published.