

PRIVACY POLICY

Version 1.0 - effective 2 September 2026

1. About this policy

- 1.1 This Privacy Policy explains how Kate Webber Accounts (“we”, “us”, “our”) collects, holds, uses and discloses your personal information.
- 1.2 We are committed to handling your personal information in line with the Australian Privacy Principles (APPs) under the Privacy Act 1988 (Cth), to the extent they apply to our practice, and with our obligations under the AML/CTF Act.
- 1.3 By engaging our services or providing us with your personal information, you agree to the terms of this Privacy Policy.

2. Information we collect

- 2.1 We may collect personal information including your name, contact details, date of birth, occupation, and financial information.
- 2.2 Where required to meet our anti-money laundering and counter-terrorism financing (AML/CTF) obligations, we may also collect identity verification documents (such as your driver’s licence or passport), beneficial ownership information, and information about the source of your funds or wealth.
- 2.3 We only collect sensitive information (such as information relevant to criminal history checks) where necessary to meet our professional or legal obligations, including under our AML/CTF program.

3. How we collect your information

- 3.1 We collect personal information directly from you, including through our website, email, phone, in person, and our online client portal.
- 3.2 We may also collect information about you from third parties, such as your representatives, other professional advisers, or publicly available sources (for

example, when conducting sanctions or politically exposed persons checks required under our AML/CTF program).

4. Why we collect, use and disclose your information

- 4.1 We collect, use and disclose your personal information to:
 - (a) provide you with accounting, bookkeeping, taxation and related professional services
 - (b) meet our professional obligations under APES 110 Code of Ethics for Professional Accountants
 - (c) meet our legal obligations, including under the AML/CTF Act
 - (d) communicate with you about your engagement
 - (e) manage our business, including billing and record keeping.
- 4.2 We won't use your personal information for any other purpose without your consent, unless required or authorised by law.

5. Disclosure to third parties

- 5.1 We may disclose your personal information to:
 - (a) our third-party service providers, such as cloud accounting and document management platforms
 - (b) other professional advisers engaged on your behalf, with your consent
 - (c) government agencies and regulators, including the Australian Taxation Office (ATO), the Australian Securities and Investments Commission (ASIC), and the Australian Transaction Reports and Analysis Centre (AUSTRAC), where required by law
 - (d) our professional indemnity insurer, if required.
- 5.2 Where we are required to submit a report to AUSTRAC, we are prohibited by law from disclosing that we have made, or are required to make, such a report, or its contents ('tipping off'). See clause 8 of our Terms of Engagement.
- 5.3 We do not sell your personal information to third parties.

6. Data storage and security

- 6.1 We store your personal information using secure, cloud-based systems with appropriate access controls.
- 6.2 We retain your personal information for as long as necessary to provide our services and meet our legal obligations, including a minimum of 5 years for general records, and at least 7 years for records relating to our AML/CTF obligations.
- 6.3 We take reasonable steps to protect your personal information from misuse, interference, loss, unauthorised access, modification or disclosure.

7. Access and correction

- 7.1 You may ask us for access to the personal information we hold about you, and ask us to correct it if it's inaccurate, out of date, or incomplete.
- 7.2 We will respond to your request within a reasonable timeframe. We may need to verify your identity before providing access.
- 7.3 There may be circumstances where we're unable to give you access to your information, such as where this would affect our AML/CTF obligations (for example, tipping off).

8. Our website

- 8.1 Our website may use cookies and similar technologies to improve your experience.
- 8.2 Information you submit through our website contact form is used only to respond to your enquiry.

9. Complaints

- 9.1 If you have a concern about how we've handled your personal information, please contact us using the details in clause 11.
- 9.2 If you're not satisfied with our response, you may lodge a complaint with the Office of the Australian Information Commissioner (OAIC) at oaic.gov.au.

10. Other

This policy will be effective for future years unless we advise you of its amendment or replacement.

11. Contact us

If you have any questions about this Privacy Policy or how we handle your personal information, please contact us at admin@katewebberaccounts.com.