

COMPLAINTS POLICY

Crofts CA Pty Ltd is committed to providing high-quality accounting, tax, and advisory services. We value client feedback and take complaints seriously. We are committed to managing disputes in a fair, timely and transparent way. This policy is designed to provide you with information on how to lodge a complaint and our process when dealing with complaints.

How to lodge a complaint

In the first instance, if you are unhappy with the advice or services provided by Crofts CA Pty Ltd and you wish to make a complaint, please contact our Complaints Officer in any of the following ways:

In writing: Suite 201 Level 2, 5 Blue Street, North Sydney NSW 2060

Email: admin@crofts.com.au

Phone: (02) 9089 1400

In Person: By appointment at our office

Please include the following:

- Your name and contact information
- A clear description of your complaint
- Relevant dates and details
- Any supporting documentation

Assistance Available to you

If you require assistance, you can contact us to help lodge your complaint.

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Complaint Process

There are three key steps when dealing with complaints, including:

1. **Acknowledgement:** Once we receive the complaint, you will receive acknowledgement within one business day of receiving it.
2. **Assessment and Investigation:** We will investigate and assess the complaint after gathering all of the required information. This may involve speaking to you directly or to other relevant parties involved in order to gain a suitable resolution.
3. **Response:** We will provide you with written communication to inform you of the final complaint outcome.

Response Timeframes

We will investigate your complaint and respond to your concerns as quickly as possible and within 30 days. At times, due to the complexity of the complaint and availability of information, it may take longer to resolve. Where a delay occurs, we will contact you in writing and provide you with the reasons for the delay.

Escalation

If you are not satisfied with our response:

- You may request a further review with a director of the firm.
- If the matter remains unresolved, and your complaint concerns a regulated service then you may also choose to notify the Tax Practitioner's Board on their website www.tpb.gov.au.

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Confidentiality

All complaints will be handled in a confidential and secure manner, and only those involved in the resolution process will be informed.

Continuous Improvement

Complaints help us improve our services. All feedback is reviewed periodically by management to identify recurring issues and implement necessary changes.

Complaints Enquiries

If you have any queries about our Complaints Policy please contact us at:

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Email address: admin@crofts.com.au

Phone Number: (02) 9089 1400