



Artificial Intelligence (AI) Policy

Dynamic Taxation and Training Services

Purpose

Dynamic Taxation and Training Services may use Artificial Intelligence (AI) tools to assist with administrative tasks, research, drafting documents, and improving efficiency within our business.

This policy explains how AI may be used and how we protect client privacy, confidentiality, and professional standards when using these technologies.

Our Approach to AI

AI tools are used only to support our work. They do not replace the professional judgment of our accountants, bookkeepers, or advisors.

All work produced using AI is reviewed by a qualified team member before it is relied upon or provided to clients.

Protecting Client Information

Protecting client information is a priority for our business.

When using AI tools, we will:

- comply with the **Privacy Act 1988 (Cth)** and the **Australian Privacy Principles**
- avoid entering sensitive client information into unapproved AI systems
- minimise the amount of information used
- de-identify information where possible
- ensure appropriate security safeguards are in place.

Confidential client information, including tax file numbers, financial records, identity documents, and personal details, will not be uploaded to AI tools unless the system has been approved for business use and appropriate protections exist.

Responsible Use of AI

Our staff may use approved AI tools to assist with tasks such as:

- drafting documents or communications
- summarising information
- preparing templates or training materials
- conducting general research
- improving workflow processes.

AI must not be used to:

- make final tax or financial decisions without human review
- provide client-specific advice without professional oversight
- disclose confidential client information to unauthorised systems
- produce misleading or inaccurate information.



Accuracy and Professional Responsibility

AI systems can produce incorrect or incomplete information. For this reason:

- all AI-generated content must be checked for accuracy
- professional judgement must always be applied
- the staff member using the AI tool remains responsible for the final work.

Security and Overseas Processing

Some AI technology providers may process data using systems located outside Australia. Where this occurs, we take reasonable steps to ensure appropriate privacy and security protections are in place.

Policy Updates

This policy may be updated from time to time to reflect changes in technology, regulation, or business practices.

Contact

If you have questions about how Dynamic Taxation and Training Services uses AI or protects your information, please contact our office info@dtts.com.au or **02 4385 7365**