



Privacy Policy

Protecting your privacy and maintaining confidentiality in relation to your personal information is something we take very seriously at Dynamic Taxation and Training Services. Our Privacy Policy is designed to ensure that we communicate to our clients, as clearly as possible, how we manage their personal information. Accordingly, we encourage you to read this policy very carefully and to contact us should you have any questions or concerns.

Dynamic Taxation and Training Services deals with your personal information and related privacy in accordance with the Privacy Act 1988 (Cth) (Privacy Act) and the Australian Privacy Principles (APPS) set out in the Privacy Act. We reserve the right to amend or modify this Privacy Policy at any time however; an up-to-date copy of this document will always remain available on our firm's website. When you visit our website, certain information may be collected automatically including your IP address, browser type and pages visited. This information is used to improve the functionality and performance of our website.

Personal Information

To provide the best possible accounting, taxation related and/or financial advisory services to you, Dynamic Taxation and Training Services needs to collect and store your personal information.

Personal information is any information which might identify you or by which your identity might reasonably be determined. Personal information collected by Dynamic Taxation and Training Services may include, but is not limited to, your name, birthdate, place of residence, email address, telephone number, bank account details, superannuation details, taxation details (both past and present), accounting and financial information.

Whilst you can of course choose not to provide us with your personal information, Dynamic Taxation and Training Services will be unable to provide you with services unless you opt to do so.

Identity Verification / AML Language

We may collect identification information from you for the purposes of identity verification and compliance with applicable laws and professional standards, including obligations relating to anti-money laundering, fraud prevention, and regulatory compliance.

How We Collect Your Personal Information

Dynamic Taxation and Training Services will, whenever possible collect your personal information from you directly. Where we are unable to obtain personal information directly from you, we may request your consent, either written or verbal as appropriate, to obtain your personal information from a third party.

Ultimately, we may collect your personal information in several ways during our relationship with you, including the following:

personal conversations with you, from documentation, hardcopy or digital media provided by you. From communications sent from you by fax, email, mail or other means. When you forward or upload electronic data to our office network, when you provide us with direct access to your electronic records or systems. Forms completed by you and returned to our office, third parties when you have authorised us to do so. Event enrolment forms. Visiting our website, or when you connect with us using social media.

In some circumstances we may receive personal information about you indirectly, such as when funds are transferred from your bank account to our trust or general accounts.

Regardless of how we collect your personal information, Dynamic Taxation and Training Services will deal with your personal information in accordance with this privacy policy.



How We Use Your Personal Information

Dynamic Taxation and Training Services uses your personal information for the following purposes:

- Verifying identify
- contact and communicate with you.
- provide you with agreed services.
- notify you of any new or amended services offered by Dynamic Taxation and Training Services. relevant to the agreed service or otherwise.
- assist you with technical support or support relating to the agreed service or otherwise.
- carry out marketing initiatives relating to the services provided by Dynamic Taxation and Training Services.
- offering you additional services.
- To comply with laws or regulations in relevant jurisdictions.

By engaging Dynamic Taxation and Training Services you consent to the collection, storage and use of your personal information for the purposes outlined in this Privacy Policy.

Whenever possible, Dynamic Taxation and Training Services will require you to specifically consent to any disclosure of your personal information to a third party where the disclosure of personal information is not in accordance with, or is unrelated to, the provision of services to you. In order to provide quality, efficient and affordable services to you, it is possible that your personal information may be viewed by third parties with whom Dynamic Taxation and Training Services has a vested relationship such as providers of auditing and bookkeeping services, audit insurance providers, accounting contractors, providers of financial services, IT contractors, and providers of software support. We may use Cloud Based Software during the analysis of your data and during the provision of some services.

Overseas Disclosure of Personal Information

Dynamic Taxation & Training Services Pty Ltd may disclose your personal information to third-party service providers located outside Australia where this is necessary to provide our services to you. Seamless SMSF Pty Ltd, with whom Dynamic Taxation and Training Services has a close, long standing and valued association.

The countries in which these service providers may be located include, but are not limited to, the United States, the United Kingdom, New Zealand, and other jurisdictions where our technology or service providers operate.

Where personal information is disclosed overseas, Dynamic Taxation & Training Services Pty Ltd takes reasonable steps to ensure that the overseas recipient handles the information in a manner consistent with the Australian Privacy Principles under the **Privacy Act 1988 (Cth)**.

By providing us with your personal information, you consent to the disclosure of your personal information to overseas recipients as described in this policy.

In certain circumstances we are required by law to collect personal information from you, including for the purposes of taxation, superannuation, and compliance with regulatory obligations administered by the Australian Taxation Office and other regulatory bodies. Once the provision of services to you is complete your personal information, both electronic and otherwise, may be retained for a minimum of seven years in order to comply with taxation and professional record-keeping obligations.



DYNAMIC

ACCOUNTING - TAXATION - ADVISORS

Keeping Your Personal Information Secure

Dynamic Taxation and Training Services is committed to the protection of your personal information whether stored electronically or on file and takes all reasonable precautions to protect it from unauthorised disclosure, access or modification. We incorporate several systems and procedures to ensure your personal information remains secure, including the following:

- Require all staff to sign confidentiality agreements.
- Maintain electronically secure premises with controlled access.
- Use secure servers, firewall protection and updated technology systems.
- Use secure document transfer links.

Protocols for fast and effective action in accordance with the Office of the Australian Information Commissioner's (OAIC) Notifiable Data Breach (NDR) scheme; training for all staff regarding the protection of client personal information in keeping with the Privacy Act and the NDR scheme.

In the event of an eligible data breach, Dynamic Taxation and Training Services will comply with the Notifiable Data Breaches scheme administered by the Office of the Australian Information Commissioner and will notify affected individuals where required. The use of passwords for access to our network and restrictions within our database to ensure that staff only access the information required to perform their duties, and security shredding bins for the disposal of written information.

Dynamic Taxation and Training Services will correspond with you by email if you indicate that this is appropriate and acceptable to you. In providing this direction you acknowledge also that the internet is not a secure environment and that the transmission of personal information over the internet is at your own risk and cannot be guaranteed by Dynamic Taxation and Training Services.

Direct Marketing

Dynamic Taxation and Training Services will, on occasion, use your personal information such as your address or contact details, to provide you with industry information or to introduce you to additional services that we offer. In this regard, we may, for example, send you written communications, electronic newsletters and/or invitations to events. If at any time you do not wish to receive information such as this, we invite you to contact us on 02 4385 7365 or to unsubscribe where offered when the communication is electronic and we will not send you any further information.

Accessing And Amending Your Personal Information

We encourage you to always communicate with us immediately there is a need to access or update your personal information.

You can at any time request access to your personal information or request that we update your personal information by contacting us on 02 4385 7365, by written communication, or by emailing us at info@dtts.com.au.

You may only access your own personal information. We will attempt to handle all requests for access to personal information in a reasonable time. If information requested is substantial, Dynamic Taxation and Training Services may charge a fee to cover the cost of retrieval and provision of the information to you. Additionally, Dynamic Taxation and Training Services reserves the right to deny access to personal information where the request for same is frivolous or vexatious.

Dynamic Taxation and Training Services may use de-identified or aggregated data for internal reporting, analytics, or service improvement purposes.

Complaints Regarding Breaches of Privacy

If at any time you believe Dynamic Taxation and Training Services to be in breach of the Privacy Act 1988 (Cth) and the Australian Privacy Principles (APPS) set out in the Privacy Act, we encourage you to contact us on 02 4385 7365 or to lodge a complaint in writing addressed as follows: The Practice Manager Dynamic Taxation and Training Services PO BOX 722 Terrigal NSW 2260. If you are unsatisfied with our response, you may contact the Federal Privacy Commissioner on 1300 363 992. Alternatively, you may write to the Director of Complaints, Office of the Federal Privacy Commissioner, GPO Box 5218, Sydney NSW 1042. This Policy was last updated on 13th February 2026.