



Updated 6 June 2026

This document relates to Perrier Ryan's collection and handling of personal information that is covered by the Privacy Act (Cth). It is not intended to cover categories of personal information not covered by the Privacy Act. It is a partner document to our Privacy Policy and designed to cover as many as possible and as known at time of preparation, third party providers/software that the firm uses to provide and/or support our delivery of services to clients.

Schedule of IT partners

- **One-Touch IT (OTIT)** – is the firm's IT management partner and provide operational IT support. This support includes, but is not limited to:
 - assisting with our IT planning – including internet management, website domain name management
 - managing our IT structure – including our MSO online server and our Microsoft licencing
 - managing our IT assets
 - our cyber security maintenance

We do not share our client information with OTIT, however on occasion, in order to provide support, a OTIT IT Technician may access our staff 'sessions'. As professional service providers, Perrier Ryan staff and OTIT staff are mindful of and respect confidentiality on such occasions.

Their privacy policy can be found [here](#).

- **ACIS + Super Depot** – one of Australia's largest business and investment structures platforms. We partner with them for the preparation of company establishment documents and other legal documents to ensure compliance and suitability for purpose. Their privacy policy can be found [here](#).
- **BGL Cas360** – supports our corporate compliance services including the management of our Tranche2 identification verification obligations, completed as part of client onboarding and mandatory ongoing checks. Their security hosting and controls information can be found [here](#); and their privacy policy [here](#).
- **Class** – to support our SMSF service. Their information security policy can be found [here](#); and their privacy policy [here](#).
- **CloudOffis** - to support our SMSF service. Their information security information can be found [here](#); and their privacy policy [here](#).
- **Fathom** – to support our business advisory services. Their information security information can be found [here](#); and their privacy policy [here](#).
- **Feesynergy** – debtor management and payment platform services. Their information security information can be found [here](#).



- **FuseWorks** – to prepare documents such as EOFY packs and ASIC annual review packs and send to clients for secure e-signing.
Their information security policy can be found [here](#).
- **Get on Cloud** – supports our SMSF service (audits)
- **Microsoft 365** – is used for communication and document management
Their information security policy can be found [here](#).
- **Microsoft Azure** – cloud-based infrastructure hosted in Australia
Their information security policy can be found [here](#).
- **MYOB** – is our practice management software
Their information security policy can be found [here](#).
- **Vision6** – an email marketing platform that we use to send out newsletter and updates regarding the firm.
Their Data Security information can be found [here](#); and their privacy policy [here](#).

At this point in time, Perrier Ryan precludes the use of online, open source AI platforms such as ChapGPT, DeepSeek, Meta AI, Grok, Inflection and, using IT settings, has blocked access to any such platforms. The firm limits AI within the firm to CoPilot, which lives within the Microsoft ecosystem. PRFA currently uses Claras to assist with the preparation of their Statements of Advice. Perrier Ryan uses the **ElfworksAI** platform to assist with tax research. Their trust and security information can be found [here](#).

In addition, staff access client files in several accounting packages (including but not limited to those shown below, as clients may have bespoke designed packages) with the express permission of the clients. Access is managed in accordance with methods designed by the software providers – such as:

- Xero
- MYOB – SME products
- Intuit QuickBooksOnline
- Reckon

These accounting packages and our online research tool (CCH's i-Know service) now have AI embedded.