

Privacy policy



We protect your personal information with care, security and transparency, using it only to deliver clear, personalised financial support you can trust.



PRIVACY POLICY

Link Wealth Accounting Pty Ltd

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1. INTRODUCTION

Link Wealth Accounting Pty Ltd (referred to in this policy as 'Link Wealth Accounting', 'we', 'us' or 'our') is an accounting practice providing taxation, bookkeeping, and related financial services to individuals and businesses across Australia.

We are committed to protecting the privacy of our clients, prospective clients, and other individuals whose personal information we hold. This Privacy Policy sets out how we collect, hold, use and disclose personal information, and how we comply with our obligations under the Commonwealth Privacy Act 1988 (Cth) ('Privacy Act') and the Australian Privacy Principles ('APPs') contained in that Act.

This Privacy Policy applies to all personal information we collect in the course of providing our services. We encourage you to read it carefully.

2. WHAT IS PERSONAL INFORMATION?

Under the Privacy Act, 'personal information' means information or an opinion about an identified individual, or an individual who is reasonably identifiable, regardless of whether the information or opinion is true or is recorded in a material form.

'Sensitive information' is a subset of personal information and includes information about a person's:

- racial or ethnic origin
- political opinions or associations
- religious beliefs or affiliations
- philosophical beliefs
- membership of a professional, trade, or political association or trade union
- sexual orientation or practices
- criminal record
- health or medical information
- genetic and certain biometric information

Sensitive information is afforded a higher level of protection under the APPs. We will only collect sensitive information with your consent, or where required or authorised by law.

In this Privacy Policy, references to 'personal information' include sensitive information unless the context requires otherwise.

3. WHAT PERSONAL INFORMATION WE COLLECT AND HOLD

We only collect and hold personal information that is reasonably necessary for, or directly related to, our functions and activities as an accounting practice. The types of personal information we may collect include:

- Full name, date of birth, and contact details including address, phone number and email
- Tax file number (TFN), Australian Business Number (ABN) and Australian Company Number (ACN), where applicable
- Financial information including income, assets, liabilities, transactions, expenses, deductions, receipts and supporting records
- Employment details and business information
- Information about your family or dependants where relevant to your tax affairs
- Bank account details for the purpose of processing refunds or payments
- Identity documents such as driver's licence or passport details where required for verification
- Any other information reasonably necessary to provide you with our services

Tax file numbers (TFNs) are collected and used strictly in accordance with the Privacy (Tax File Number) Rule 2015 made under section 17 of the Privacy Act. We will only collect, hold, use or disclose your TFN for purposes authorised by that Rule, including the preparation and lodgement of tax returns and other ATO obligations. Your TFN will not be used or disclosed for any other purpose.

4. HOW WE COLLECT YOUR PERSONAL INFORMATION

We collect personal information only by lawful and fair means. In most cases, we collect personal information directly from you. This may occur when you:

- Engage us to provide accounting or taxation services
- Complete forms, questionnaires, or engagement documents
- Communicate with us by telephone, email, or in person
- Attend meetings at our office or by video conference
- Submit documents, returns, or other records to us

We may also collect personal information from third parties in certain circumstances, including:

- From the Australian Taxation Office (ATO) or other government bodies when acting on your behalf
- From financial institutions, employers, or other third parties where you have provided consent
- From referrers, such as other professionals who refer you to us
- From publicly available sources where relevant to your affairs

Where we collect personal information about you from a third party, we assume you have authorised that party to provide us with your information. Where we collect information about third parties connected to you (such as family members), we assume you have obtained their consent for us to collect and handle that information.

We will inform you at or before the time of collection (or as soon as practicable after) of the purposes for which we are collecting your information, how it will be used and disclosed, and how you can access and correct it.

In addition to our obligations under the Privacy Act, we handle personal information in accordance with the Tax Agent Services Act 2009 (Cth) (TASA) and the Tax Practitioners Board (TPB) Code of Professional Conduct. These obligations require us to maintain the confidentiality of client information and to use it only for the purposes for which it was provided.

5. HOW WE USE AND DISCLOSE YOUR PERSONAL INFORMATION

Primary purpose

We collect, hold, use and disclose your personal information primarily to provide you with accounting, taxation, and bookkeeping services. This includes:

- Preparing and lodging tax returns, activity statements, and other ATO submissions
- Providing tax and financial advice
- Completing business registrations and compliance obligations
- Communicating with the ATO, state revenue offices, and other authorities on your behalf
- Managing our client relationship and administering our engagement with you

Secondary purposes

We may also use your personal information for secondary purposes where:

- You have consented to that use or disclosure
- The secondary purpose is related to the primary purpose and you would reasonably expect us to use or disclose the information for that secondary purpose
- Use or disclosure is permitted or required by law

Secondary purposes may include informing you of updates to tax legislation, regulatory changes, or other services we offer that may be relevant to your circumstances.

Disclosure to third parties

We may disclose your personal information to third parties in the course of providing our services. These may include:

- The ATO, state and territory revenue offices, ASIC, and other government or regulatory bodies
- Other professional advisers such as financial planners, solicitors, or mortgage brokers, where you have authorised us to liaise with them
- Cloud-based software providers and IT service providers that assist us in delivering our services (e.g. accounting software platforms, document management systems)
- Our professional indemnity insurers or legal advisers, where necessary

We will not sell, rent, or trade your personal information to third parties for their own marketing purposes.

We will take reasonable steps to ensure that third parties to whom we disclose personal information are bound by appropriate privacy and confidentiality obligations.

Disclosure within the Link Wealth Group

Link Wealth Accounting Pty Ltd operates within the Link Wealth Group, which includes Link Wealth Advice and Link Wealth Finance. We may disclose your personal information to other entities within the Link Wealth Group where this is necessary to provide you with services, where you have consented, or where you would reasonably expect such disclosure. Any intra-group disclosure is subject to the same privacy obligations that apply to our own handling of your information.

Overseas disclosure

Some of the software and cloud platforms we use to deliver our services may store or process data on servers located outside Australia. These include cloud-based accounting and practice management platforms that may host data in countries such as the United States, Ireland, or Singapore. We take reasonable steps to ensure that these providers maintain security standards and privacy protections consistent with Australian law, including through contractual obligations and, where applicable, certifications such as ISO 27001 or SOC 2.

Under the Privacy Act, where personal information is disclosed to an overseas recipient, we remain accountable for that recipient's handling of the information to the same extent as if we had handled it ourselves, unless an exception applies. By signing our client engagement agreement, you acknowledge that your information may be stored or processed overseas as part of our use of these platforms. If you have concerns about overseas transfers, please contact us to discuss your options.

6. STORAGE AND SECURITY OF YOUR PERSONAL INFORMATION

We take reasonable steps to protect your personal information from misuse, interference, loss, and from unauthorised access, modification, or disclosure. Our security measures include:

- Secure electronic storage systems with access controls and encryption where appropriate
- Password protection and multi-factor authentication on our systems
- Secure physical storage of any hard copy documents
- Confidentiality obligations imposed on our staff
- Regular review of our data security practices

We will retain your personal information for the period required to provide our services and to fulfil our legal and professional obligations. Retention periods vary depending on the type of record. Under the Tax Agent Services Act 2009 and ATO requirements, registered tax agents must generally retain client records for a minimum of five years. However, certain records — including those relating to capital gains, trusts, or superannuation — may need to be retained for longer periods. Where required by law, we will retain records for the full period mandated regardless of whether we continue to provide services to you. When your personal information is no longer required, we will take reasonable steps to destroy or permanently de-identify it.

7. QUALITY OF YOUR PERSONAL INFORMATION

We take reasonable steps to ensure that the personal information we collect, use, or disclose is accurate, complete, up-to-date, and relevant for the purpose for which it is being used.

We encourage you to inform us promptly of any changes to your personal information, such as a change of address, contact details, or personal circumstances, so that we can keep our records current.

8. ACCESSING AND CORRECTING YOUR PERSONAL INFORMATION

You have the right to request access to personal information that we hold about you, and to request corrections where you believe that information is inaccurate, incomplete, out-of-date, irrelevant, or misleading.

To make a request for access or correction, please contact us in writing using the details provided at the end of this policy. We will respond to your request within 30 days of receipt. We will not charge you for making a request, but may charge a reasonable fee for the costs of providing access (for example, photocopying or postage costs).

We may decline a request for access in certain circumstances permitted by the APPs, including where providing access would be unlawful, would pose a serious threat to health or safety, or would prejudice the activities of an enforcement body. If we decline your request, we will advise you in writing of the reasons and how you may complain about our decision.

9. ANONYMITY AND PSEUDONYMITY

Where lawful and practicable, you may interact with us anonymously or by using a pseudonym. However, given the nature of our accounting and taxation services, we are generally required by law to verify your identity and will need to collect personal information (including your TFN) to provide most of our services. Anonymity will therefore not be possible in most circumstances.

10. DATA BREACHES

We are subject to the Notifiable Data Breaches (NDB) scheme under Part IIIC of the Privacy Act. If we have reasonable grounds to believe that an eligible data breach has occurred that is, a breach that is likely to result in serious harm to one or more individuals we are required to conduct an assessment within 30 days of forming that belief. Where our assessment confirms an eligible data breach, we will notify affected individuals and the Office of the Australian Information Commissioner (OAIC) as soon as practicable.

In assessing whether a breach is likely to result in serious harm, we consider factors including:

- The nature and sensitivity of the information involved
- Whether the information was encrypted, anonymised, or otherwise protected
- The number of individuals affected
- The likelihood that the information could be used to cause harm
- The identity and likely intentions of any person who accessed the information

We maintain an internal data breach response plan to ensure we respond to breaches promptly and appropriately.

11. DIRECT MARKETING

We may use your contact details to send you information about changes to tax law, relevant regulatory updates, or services we offer that may be of interest to you. We will only do so where you have provided your express or inferred consent, or where we are otherwise permitted to do so under applicable law, including the Spam Act 2003 (Cth). All marketing communications we send electronically will include a functional unsubscribe mechanism in accordance with the Spam Act.

You may opt out of receiving marketing communications from us at any time by contacting us using the details below or by following the unsubscribe instructions in any communication we send you. We will honour all opt-out requests promptly and within five business days.

12. WEBSITE AND DIGITAL COMMUNICATIONS

If we operate a website, it may use cookies or similar technologies to improve user experience and monitor site usage. Cookies are small data files stored on your device. You may configure your browser to refuse cookies, although this may affect your ability to use some features of our website.

Our website may contain links to third-party websites. We are not responsible for the privacy practices of those websites and encourage you to review their privacy policies.

13. USE OF TECHNOLOGY AND AUTOMATED TOOLS

We may use technology tools, including cloud-based accounting software and, where appropriate, AI-assisted tools to support the delivery of our services. Where we use such tools, we take reasonable steps to ensure that any client data is handled securely and in accordance with this Privacy Policy and the APPs.

We do not use automated decision-making processes that would have a significant legal or similarly significant effect on you without your involvement. If you have questions about how we use technology in delivering our services, please contact us.

14. COMPLAINTS AND ENQUIRIES

If you have a concern or complaint about the way we have handled your personal information, or believe we have breached the APPs, please contact us in the first instance. We take privacy complaints seriously and will investigate your concern promptly and fairly.

Please direct your complaint or enquiry to:

Attention:	Privacy Officer
Practice:	Link Wealth Accounting Pty Ltd
Address:	714-716 High St, Kew East VIC 3102
Email:	mktg@linkwealth.com.au

Phone: (03) 9038 8267

We will acknowledge your complaint and respond within 30 days of receipt. If you are not satisfied with our response, you may contact the Office of the Australian Information Commissioner (OAIC):

Website: www.oaic.gov.au

Phone: 1300 363 992

Post: GPO Box 5218, Sydney NSW 2001

15. CHANGES TO THIS PRIVACY POLICY

We may update this Privacy Policy from time to time to reflect changes in our practices, technology, or legal obligations. The current version will always be available on our website and upon request at no charge.

Where we make material changes to this policy, we will notify existing clients by email at least 14 days before the changes take effect. We encourage you to review this policy periodically to stay informed about how we handle your personal information.

Link Wealth Accounting Pty Ltd

This policy is issued for the purposes of the Privacy Act 1988 (Cth) and the Australian Privacy Principles.
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