



Privacy Policy

Key Details	
Who are we?	SYNERGISTIC BUSINESS PARTNERS PTY LTD ACN 615 170 511 (Synergistic Business Partners)
Our contact details.	Email: toby@sybp.com.au Address: Suite 503, Level 5 201 Pacific Hwy, St Leonards NSW 2065 Postal Address: PO Box 338, St Leonards NSW 1590 Phone Number: +61 2 8004 1959 Contact Person: Toby Barber
This Privacy Policy.	In this privacy policy, 'we' and 'us' refers to Synergistic Business Partners, and 'you' refers to any individual about whom we collect personal information. In this privacy policy, unless the context otherwise requires, the meaning of general words is not limited by specific examples introduced by including, for example or similar expressions.
Privacy is important.	Protecting your privacy is important to us. We adhere to the Australian Privacy Principles (APP) contained in the <i>Privacy Act 1988</i> (Cth) (Privacy Act), subject to exemptions that are applicable to us under the Privacy Act. We also comply with the Privacy (Tax File Number) Rule 2015 (TFN Rule) issued under s 17 of the Privacy Act.
What is this?	This Privacy Policy sets out how we will collect, use, store and disclose your personal information. By providing personal information to us, you expressly consent to our collection, use and disclosure of your personal information in accordance with this Privacy Policy and any other arrangements that apply between you and us. We may change our Privacy Policy from time to time by publishing changes to it on our website and / or as an email update to all users. We encourage you to check our website and your email periodically to ensure that you are aware of the terms of our current Privacy Policy.
Personal information.	Unless indicated otherwise, 'personal information' is the term used in this Privacy Policy to refer to 'personal information' as defined in the Privacy Act.
Our services.	We provide accounting, taxation and general business services. We use your personal information to provide our service to you and improve your experience with us.

1. Types of personal information we collect

We may collect personal information where it is reasonably necessary for us to perform our functions and activities as a provider of accounting, taxation and business advisory services. The types of personal information that Synergistic Business Partners collects will depend on the nature of your dealings with us. It may include the following types of personal information (either directly from you or from third parties):

- (a) identity: your personal details including your full name, job title, residential address, mailing address, email address, mobile number, gender, age and date of birth, your image and digital signature and information reasonably required to verify your identity;
- (b) financial: including your bank account details, credit card or debit card information and details, your Tax File Number (TFN), your tax returns, financial statements, bank account statements, access to your cloud accounting software;
- (c) technical: information about how you've used and accessed our website and / or mobile apps, including your Internet Protocol (IP) address, browser and device details, geo-location data, network information, statistics on website usage (including session time and views), acquisition sources, search terms used and browsing behaviour (including via cookies and other analytical tools) and other similar information;
- (d) marketing: details regarding your marketing preferences and requests;
- (e) your history with us: including details of your previous matters with us;
- (f) employment history: if you apply for a role with us, we may collect information regarding your employment history and other career related details;
- (g) your feedback: testimonials and feedback; and
- (h) other information: any information that is required or authorised by law and any other personal information that you choose to provide in connection with your dealings with us.

2. Tax File Numbers

- (a) We are a 'TFN recipient' under the TFN Rule.
- (b) It is not an offence if you refuse to provide your TFN to us and you are under no obligation to do so. However, if you do not do so, we may be unable to provide our services to you.
- (c) We will take reasonable steps to ensure that we only request or collect information that is necessary and relevant to the purpose of collection under applicable laws.

3. Third parties

- (a) We endeavour to collect personal information directly from the individuals concerned. However, we may also collect personal information from third parties, or from publicly available sources, including:
 - (i) your organisation, or individuals affiliated with your organisation;



- (ii) government agencies;
 - (iii) publicly available records, including registry records, court, and tribunal records;
 - (iv) ratings and search agencies;
 - (v) online searches; and
 - (vi) recruitment agencies.
- (b) If you provide personal information about other people (for example, a member of your organisation, a supplier, customer or affiliate of your organisation, or a family member), we rely on you to inform those people that you're sharing their personal information with us. We also expect that you will have sufficient authority to provide the relevant information on their behalf, that you will provide information which is accurate and complete, and you must also let them know about this Privacy Policy and how to access it. We may collect contact information from you (e.g. your name, title and work contact details) automatically using the details in your email signature if you interact with us via email.
- (c) Sensitive information is a subset of personal information that is generally afforded a higher level of privacy protection. Synergistic Business Partners will not ask to collect sensitive information about you (such as details of your racial or ethnic origin, political affiliation, religious beliefs, sexual preferences, criminal convictions, or health information) unless it is reasonably required in the circumstances. To the extent we do collect sensitive information about you, we will obtain your consent unless it is unreasonable or impractical to do so, or where otherwise permitted under the Privacy Act (e.g. where a child may be at risk, on the basis that it would be unreasonable to obtain the parent's consent).

4. How we collect and hold your personal information

- (a) We may collect personal information from you during your dealings with us, including when you:
- (i) are engaged with our practice as a client;
 - (ii) we are working on a matter that you are involved in;
 - (iii) are involved in a matter with one or more of our clients;
 - (iv) have asked us to place you on one of our mailing lists;
 - (v) supply goods or services to us;
 - (vi) browse our website;
 - (vii) send us an enquiry or provide us with feedback;
 - (viii) attend or participate in any seminar or function hosted by us;
 - (ix) apply for a job with us; and
 - (x) are employed by us.
- (b) Service providers may hold your personal information on our behalf. Where a service provider holds any personal information, we require them to be compliant with the APP and the Privacy Act to ensure no mishandling of any personal information you have provided to us.



5. Voluntary collection

We collect information from you on a voluntary basis. You are not under any obligation to provide information to us. However, if we do not collect your personal information, including where you choose not to provide your personal information to us, we may be unable to provide our services to you.

6. Purpose of collection

- (a) We need to collect, hold, use and disclose personal information to carry out our business, including for the following purposes:
- (i) to provide our services to you, including providing accounting, tax and business advisory services;
 - (ii) to grant you access to our website and related platforms and software;
 - (iii) to set you up as a client in our systems and conduct required checks, conflict checks and verifications of identity for compliance purposes;
 - (iv) to enhance and develop our platforms and services;
 - (v) to liaise with government, regulatory or other authorities on your behalf (if required), including lodging tax returns;
 - (vi) to maintain internal records, manage administration, and handle invoicing and billing;
 - (vii) for marketing, advertising and business development, including to promote and manage our events, services, firm updates, news and other information;
 - (viii) to evaluate job applications, perform pre-employment checks, and share future job opportunities that may suit you;
 - (ix) to support business activities like mergers, acquisitions, joint ventures, or referrals;
 - (x) to manage and comply with our insurance obligations; and
 - (xi) to fulfil legal, regulatory and compliance obligations.
- (b) We may also collect personal information to communicate new accounting, tax, business advisory or firm developments to our contacts and to those people who have subscribed to our mailing lists. If, at any time, you do not wish to receive these kinds of communications, please let us know using the contact details set out below.
- (c) You agree and consent to us using and disclosing your personal information for any of the purposes listed in this clause 6.

7. Third party disclosure

We may disclose personal information to:

- (a) disclosures to external service providers – we may disclose personal information to external service providers who provide services to you and help us operate our business. Some



examples of our external service providers include: lawyers, finance brokers, financial planners and advisors, insurance brokers, bookkeepers, specialist tax consultants, business consultants, mediators, valuation professionals, accountants, third party data storage providers, IT and other software and systems providers, companies who provide photocopying and archiving services, advertising and marketing agencies who assist us with our campaigns and programs; and

- (b) disclosures required or permitted by law – otherwise, Synergistic Business Partners will only disclose personal information if this is required by law or permitted under the Privacy Act. Synergistic Business Partners is also bound by professional obligations of confidentiality, including in relation to personal information.

8. International disclosure

- (a) We may disclose your personal information to overseas entities, and your personal information may be stored overseas. Some of our software providers, hosting providers, team members and other suppliers may be located overseas from time to time.
- (b) By providing your personal information and sensitive information to us, you consent to the disclosure of your information outside of Australia and acknowledge that we are not required to ensure that overseas recipients handle that personal information in compliance with Australian Privacy Law.

9. Security of personal information

9.1 Reasonable steps

Synergistic Business Partners will take reasonable steps to ensure the security of your personal information.

9.2 Cookies

We use cookies or similar digital markers to maintain user sessions and track the behaviour of website visitors. This enables us to keep our site relevant and useful. However, generally this information will not identify you unless you make an enquiry on our website contact us form. If you make an enquiry via our website contact us form, we may link this information back to your identity and other information that you have provided to us. This helps us to engage with you in a more efficient and effective manner and provide any services you have requested from us.

9.3 Website

- (a) Whilst we strive to protect the personal information and privacy of users of our websites, we cannot guarantee the security of any information that you disclose online, and you disclose that information at your own risk. If you are concerned about sending your information over the internet, you can contact us by email or post.
- (b) By using our website(s), you consent to our use of cookies in accordance with the terms of this privacy policy. You may contact us at any time by using the contact details below to opt out or to make a different request.



9.4 Third-party websites

- (a) We and our service providers also use cookies and other digital markers to assist us with our online marketing services and advertise to our website visitors on other third-party websites or platforms (eg. Google Ads Services or LinkedIn). We may disclose the information collected via cookies on our websites to third parties for marketing purposes.
- (b) Sometimes our website contains links to other websites, for your convenience and information. When you access a website other than 'www.sybp.com.au', please understand that Synergistic Business Partners is not responsible for the privacy practices of that site. We suggest that you review the privacy policies of each site you visit.

10. Your rights

- (a) The laws of New South Wales, Australia govern this Privacy Policy. However, you will benefit from any mandatory provisions of the law around privacy and data protection in the country of which you are a resident. Nothing in this Privacy Policy affects your rights to rely on such mandatory provisions of the local law.
- (b) Under the Privacy Act, you have the right to:
 - (i) seek access to your personal information handled by Synergistic Business Partners;
 - (ii) ask us to update or correct your personal information when it is inaccurate, incomplete or out of date; and
 - (iii) opt-out of receiving direct marketing communications from us.
- (c) Please contact us using the details in the 'key details' on page one if you would like to access or correct the personal information that we hold about you. We may require you to verify your identity before processing any access or correction requests to ensure that the personal information we have is adequately protected.

11. Contact us and / or make a complaint

- (a) If you need to get in contact with us (including to request access to your personal information, to make a complaint about our privacy practices, or if you have any questions or comments about the privacy policy), please email us using the details at the beginning of this Privacy Policy.
- (b) Please include all relevant information when you contact us (including your name, email and a clear description of your query).
- (c) We will deal with all requests for access to personal information or complaints as quickly as possible and will endeavour to get back to you within a reasonable timeframe.

12. Updates

We may amend this Privacy Policy from time to time. Changes will take effect by being published on our website. The privacy policy will be made available to anyone who requests it, whether at our offices or by use of our website.