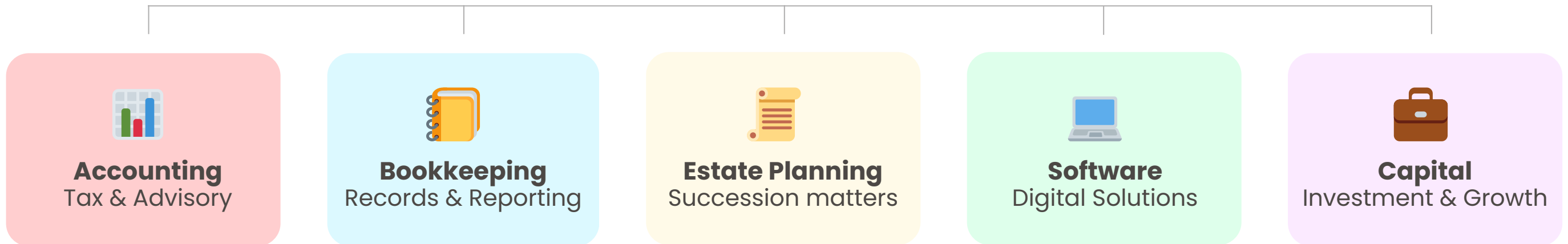



# PRIVACY POLICY

How we collect, use, protect and respect your personal information across all Invigor8 divisions – in line with the Privacy Act 1988 (Cth) and Australian Privacy Principles (APPs).

## Invigor8 Multi-Division Practice





Staff only access your data on a need-to-know basis. If you only use one division, your information stays within that team unless the law says otherwise or you agree to share it.

| What Information We Collect   | Why We Collect   | How We Collect  |
|---|--|---|
| <ul style="list-style-type: none"> <li>Name, address, email &amp; phone number</li> <li>Tax File Number (TFN) &amp; ABN</li> <li>Keep your information confidential (subject to legal obligations)</li> <li>Bank account &amp; superannuation details</li> <li>Identification documents (e.g. licence, passport)</li> <li>Date of birth</li> <li>Financial &amp; taxation information</li> <li>Business records &amp; transaction data</li> <li>Employment info (job applicants / contractors)</li> </ul> | <ul style="list-style-type: none"> <li>Provide accounting, taxation, audit and advisory services</li> <li>Help with estate planning and succession</li> <li>Support capital raising and transactions</li> <li>Develop and support software solutions</li> <li>Lodge documents with the ATO</li> <li>Verify your identity and meet legal obligations</li> </ul> | <ul style="list-style-type: none"> <li>Directly from you – meetings, phone, email or online forms</li> <li>From third parties with your consent (e.g. ATO, financial institutions)</li> <li>Through our website (contact forms &amp; cookies)</li> <li>From publicly available sources where appropriate</li> </ul>  |

### Who we may share this information with – only when required and authorised

- Government agencies (e.g. ATO)
- Regulatory bodies (e.g. ASIC, AUSTRAC)
- Professional advisers (lawyers, auditors, planners)
- IT service providers assisting our services

| Internal Sharing Rules   | Data Security   | Data Retention   | Note:   |
|--|---|--|---|
| <ul style="list-style-type: none"> <li>Access is limited to staff who need it for your service</li> <li>Role-based permissions and confidentiality applies</li> <li>Can request additional restrictions on internal sharing</li> </ul>  | <ul style="list-style-type: none"> <li>Secure cloud-based systems</li> <li>Password protection &amp; access controls</li> <li>Confidentiality obligations for all contractors</li> <li>Multi-factor authentication</li> <li>Regular privacy &amp; cybersecurity training</li> </ul> | <ul style="list-style-type: none"> <li>Client records kept for a <b>minimum of 7 years</b></li> <li>Longer retention where required by law</li> <li>Records securely destroyed or de-identified when no longer needed</li> </ul>  | <p>Estate planning involves highly personal and family information. We take additional steps to protect this data from misuse, loss or unauthorised access.</p> |

**Your privacy matters to us.** Invigor8 Group is committed to handling your personal information with the highest standards of care, security and transparency.



## Our Cloud Software & Service Providers

Some providers may store data overseas. We ensure all comply with Australian Privacy Principles including **APP 8 (cross-border disclosure)**

### You have control over your data

You have the right to request access to your personal information, ask us to correct inaccurate information, opt out of direct marketing communications at any time, interact with us anonymously where possible, request limitations on how your information is shared internally, and enquire about any overseas disclosures of your personal information.

### ✓ We keep your data safe

If a data breach is likely to result in **serious harm**, we will comply with the Notifiable Data Breaches (NDB) Scheme – notifying both affected individuals and the **Office of the Australian Information Commissioner (OAIC)** promptly.



For more information,  
visit us at [invigor8.com.au](https://invigor8.com.au)