



**TAX EXPERTS LIMITED**  
**CHARTERED ACCOUNTANTS**

**Privacy Policy**

Tax Experts Limited is committed to protecting the privacy of the personal information of its clients, partners and employees. We value the trust of the public and those we deal with and recognize that maintaining this trust requires transparency and accountability in how we treat personal information that is shared with us. This Privacy Policy Statement (“Policy”) has been adopted to guide how we collect, use, store and disclose the personal information acquired while conducting our business and fulfilling our professional responsibilities.

Please be aware that Tax Experts Limited may contain links to other sites that are governed by other privacy statements that may differ somewhat and/or contain information as required under local law. We encourage users to review the privacy policy of each Web site visited before disclosing any personal information.

**If you have any questions regarding this Policy, please contact us.**

We adhere to the requirements of the law and our professional standards, and as we conduct our business operations, we frequently gather and use personal information. We seek consent to use this information when it is collected and recognize your expectation that it will be carefully protected. Our privacy practices require that we only use personal information outside of our agreed “Terms of Engagement” after obtaining appropriate consent.

Personal information is defined as any information that can be used to distinguish, identify or contact a specific individual, including information about identity, age, income, opinions or beliefs, home location and family. However, business contact and other information about individuals that is available in the public domain, such as names, addresses and telephone numbers published in directories, are not considered personal information. Public information is not subject to privacy legislation and therefore is excluded from this policy and is not subject to the same protections as is the case with personal information.

However, we do not disclose personal information about our staff, partners and clients without consent.

**Collection and Use of Personal Information**

We obtain personal information about you only if you choose to provide it, such as customer due diligence information to register for certain services. In some cases, you may have previously provided your personal information to Tax Experts.

Other information we collect may depend on the privacy settings you establish with your social media provider, so please review the privacy statement or policy of the applicable service.

**By submitting personal information to Tax Experts Limited, you are also agreeing to the use of this information in accordance with this Policy.** Your personal information is not used for other purposes, unless we obtain your permission, or unless otherwise required or permitted by law or professional standards.

## **Sensitive Personal Information**

Tax Experts Limited generally collects only the personal information required to fulfil your request. If additional information is required, you will be notified of this at the point of collection. Tax Experts Limited only collects “sensitive” personal information if we are required to, under AML laws or voluntarily by you to ensure that Tax Experts Limited can provide accurate advice and only where it is required for a specific purpose and is permitted to be collected by law or professional standards.

**Please do not provide sensitive personal information to Tax Experts Limited, unless you consent to our use of that information for its legitimate business purposes and consent to the transfer and storage of the information to and in Tax Experts Limited databases.** If you question the necessity of providing sensitive information for any particular purpose, please contact us.

## **Consent**

Your consent is required for the collection and proposed use of personal information when information is collected. Consent can be either explicit or implied and can be provided directly to us by you or your authorized representative.

## **Children**

Tax Experts Limited understands the importance of protecting children’s privacy, especially in an online environment. Our sites are not intentionally designed for, or directed at, children under the age of 13, and our policy is never to knowingly collect or maintain children’s information except where required as part of an engagement to provide professional services.

## **Sharing and Transfer of Personal Information**

In some instances, Tax Experts Limited may share your personal information with outside agencies for the purpose of AML, companies, service providers or vendors. This may include the transfer of this information across geographical borders or third parties working with us or on our behalf to help fulfil your requests. Tax Experts Limited may also store personal information in other legal jurisdictions. **By providing personal information to us, you are consenting to the transfer and/or storage of your personal information in this manner.** Tax Experts Limited does not sell personal information to any third parties, nor will Tax Experts Limited transfer your personal information to any third parties for their own direct marketing use.

## **Compliance with Laws and Regulations**

Tax Experts Limited may be required to disclose personal information in response to requests of government or law enforcement agencies or where disclosure is required by applicable laws, court orders, or government regulations. These disclosures may also be needed for data privacy or security audits and/or to investigate or respond to a complaint or security threat.

## **Accuracy**

Personal information will be maintained as completely, accurately and up to date as possible. You are encouraged to review, correct and update personal information. Under most circumstances you have the right to reasonable access to your personal information to correct any inaccuracies. You can also make a request to update or remove information about you by contacting us and we will make all reasonable and practical efforts to comply with your request, so long as it is consistent with applicable law and professional standards.

## **Information Security**

Tax Experts Limited has reasonable security policies and procedures in place to protect personal information from unauthorized loss, misuse, alteration, or destruction. Appropriate physical and electronic measures are also used to help ensure that personal information is secure. To the best of our ability, access to your personal information is limited to those who require the information to fulfil their job responsibilities. Those individuals who have access to the data are required to maintain the confidentiality of such information. However, despite our best efforts, security cannot be absolutely guaranteed against all threats.

## **Retention of Personal Information**

Personal information will not be used or disclosed for purposes other than those for which it has been collected, except with your consent or as required by law. We do not share personal information with unaffiliated third parties, except where necessary for legitimate professional and business needs, to carry out your requests, and/or as required and permitted by law or professional standards. We also make reasonable efforts only to retain personal information so long as it is necessary to comply with your request or as required by AML legislation.

## **Changes to This Policy**

Tax Experts Limited may modify this Policy from time to time to advise of changes to our current privacy policies and practices.

## **Policy Questions and Enforcement**

Tax Experts Limited is committed to protecting the privacy of your personal information. If you have questions or comments about our administration of your personally identifiable information, please contact us.

Please contact us if you have any questions

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