

Privacy Policy – LedgerLift

1. Overview

LedgerLift Pty Ltd (“we”, “us”, “our”) is committed to protecting personal information and handling it in accordance with the Australian Privacy Principles (APPs) under the Privacy Act 1988 (Cth).

This Privacy Policy outlines how we collect, use, disclose and manage personal information in the course of providing CFO and advisory services.

Further information about privacy in Australia is available from the Office of the Australian Information Commissioner at www.oaic.gov.au.

This Privacy Policy is reviewed periodically to ensure it remains up to date with our operations, regulatory requirements, and best practice.

2. What Information We Collect

We collect personal and business information reasonably necessary to provide our services. This may include:

- Names and contact details
- Financial information (including bank account details and financial records)
- Business performance and operational data
- Director, shareholder and employee information (including payroll-related data where relevant)
- Any other information provided to us in connection with our services

We only collect information that is reasonably necessary for our functions and activities.

3. How We Collect Information

We collect information directly from you or your authorised representatives through:

- Shared digital documents (e.g., Google Sheets, Excel)
- Email and other electronic communications
- Access to cloud-based accounting or business systems
- Physical documents or storage devices (e.g., USB)
- Information collected via our website, including contact forms and analytics (if applicable)

We may also collect information from third parties where authorised, including accountants, bookkeepers, payroll providers, and other professional advisers.

4. Purpose of Collection and Use

We collect and use personal information for purposes including:

- Delivering CFO and advisory services
- Financial reporting, forecasting and analysis
- Strategic planning and business advisory

We do not use personal information for marketing purposes without your consent.

Our services are provided on a commercial basis and do not constitute personal financial product advice.

5. Disclosure of Information

We may disclose personal information where reasonably required to provide our services or where required by law. This may include disclosure to:

- Cloud software providers and IT service providers
- Payroll and operational service providers
- Regulatory or government authorities

We aim to be transparent about how personal information flows through our systems and third-party platforms. While we rely on these service providers to handle personal information responsibly, we are not responsible for their internal privacy practices.

We do not sell personal information to third parties.

7. Use of Artificial Intelligence

We may use artificial intelligence (AI) tools and technologies to assist in delivering our services, including analysing financial data, generating reports, and improving operational efficiency.

Where AI tools are used:

- Personal information is only used for the purposes outlined in this policy
- AI tools may process information on servers that could be located outside Australia, but outputs are always subject to human oversight
- We implement controls to protect the accuracy and security of information and do not rely solely on automated decision-making

8. Security of Information

We take reasonable steps to protect personal information from misuse, interference, loss, and unauthorised access, modification or disclosure.

These steps include:

- Secure cloud-based environments
- Access controls and password protection
- Encryption where appropriate
- Internal confidentiality obligations
- Staff training and awareness

Access to information is limited to personnel who require it to perform their role.

9. Accuracy of Information

We take reasonable steps to ensure that personal information is accurate, up to date and complete.

You should notify us promptly if your information changes.

10. Access and Correction

You may request access to the personal information we hold about you or your business and request corrections if that information is inaccurate, out-of-date, incomplete, irrelevant or misleading.

Requests can be made using the contact details below.

11. Retention and Destruction of Information

We retain personal information only for as long as necessary to fulfil the purposes outlined in this policy or to comply with legal and regulatory obligations.

When information is no longer required, we take reasonable steps to securely destroy or de-identify it.

12. Data Breaches

We maintain procedures for identifying, assessing and responding to data breaches.

In the event of a data breach involving personal information, we will act in accordance with the Notifiable Data Breaches (NDB) scheme under the Privacy Act 1988 (Cth), including:

- Containing the breach
- Assessing the risk of harm
- Notifying affected individuals and regulators where required
- Taking steps to prevent recurrence

13. Complaints

If you have a concern about how we have handled your personal information, please contact us in writing using the details below.

We will investigate your complaint and respond within a reasonable timeframe.

If you are not satisfied with our response, you may contact the Office of the Australian Information Commissioner.

14. Contact Us

If you have any questions, requests or complaints regarding this Privacy Policy or how we handle personal information, please contact us at contact@ledgerlift.com.au.