



EXIGO TAX

Privacy Policy

How we handle your personal information

Integrated by design.

Exigo Tax · ABN 43 417 636 510

A registered business name of Francis Lauchlan

Registered Tax Agent 26043449

About this policy

This policy explains how Exigo Tax collects, uses, shares and protects your personal information.

It applies to everyone who uses our website for a tax enquiry, makes a tax enquiry, or becomes a tax client.

WHO WE ARE

Exigo Tax is a registered business name of Francis Lauchlan (known as Frank), ABN 43 417 636 510, registered tax agent 26043449. Exigo Tax is part of Exigo Finance Group. In this policy, “we”, “us” and “our” means Exigo Tax.

THE LAWS WE FOLLOW

We handle personal information in line with the *Privacy Act 1988* (Cth), the Australian Privacy Principles, and the Privacy (Tax File Number) Rule 2015.

Our lending business. Exigo Finance Pty Ltd is a separate business within Exigo Finance Group, with its own privacy policy. If you use its lending services, that policy applies to them.

What we collect

We collect only what we need to provide our tax services and meet our legal obligations. Depending on the work, this may include:

- **Contact and identity details:** name, date of birth, address, phone, email, and identity documents such as a driver’s licence or passport
- **Tax information:** your tax file number (TFN), income, deductions, assets, investments, previous tax returns and ATO correspondence
- **Financial information:** bank account details for refunds, and records supporting your income and deductions
- **Business information:** ABN, business structure, financial statements, BAS and bookkeeping records, if you run a business
- **Family information:** details of your spouse, partner or dependants, where relevant to your tax affairs
- **Website and enquiry information:** what you tell us through our enquiry form or booking system, and basic website usage data

YOUR TAX FILE NUMBER

We ask for your TFN only because taxation law authorises us to, and use it only for tax purposes. You don’t have to give it to us, and declining isn’t an offence, but without it we may not be able to lodge your return or act as your tax agent. **We never ask for your TFN on our website enquiry form or by email.**

Sensitive information

We don’t usually collect sensitive information such as health details. If it’s relevant, for example to claim a medical-related expense, we’ll collect it only with your consent.

Dealing with us anonymously

You can make a general enquiry without identifying yourself, but we can’t prepare or lodge a tax return for you anonymously.

How we collect and use it

We collect information mostly directly from you: through our website enquiry form, when you book a meeting, in meetings and calls, and through our secure client portal. With your permission, we may also collect information from:

- the ATO, through our tax agent access
- your previous accountant, bookkeeper or adviser
- your bank, employer or other organisations that issue records you need for your tax return

Why we use it

- prepare and lodge tax returns, BAS and other documents with the ATO, and deal with the ATO on your behalf
- give you tax advice and help you plan your tax affairs
- set up business and investment entities you've asked us to establish
- verify your identity
- manage our relationship with you, including appointments, invoices and reminders
- meet our legal obligations, including tax agent, anti-money laundering and record-keeping laws

SHARING WITH EXIGO FINANCE

We share your tax information with Exigo Finance only when you ask us to or give us permission, for example so your tax return can support a loan application.

MARKETING

We may send you occasional updates about our services. Every message has an unsubscribe option, and you can opt out at any time. **We never sell your personal information.**

Who we share it with

We share your information only as needed to provide our services, or where the law requires it. This may include:

- **The ATO, ASIC and other government agencies**, to lodge returns, register entities and meet legal obligations
- **Software and service providers** we use to run our practice, such as tax and practice management, client portal, document storage, email and booking systems
- **Professional advisers and insurers**, such as our lawyers and professional indemnity insurer
- **The Tax Practitioners Board or our professional body**, if they review our practice
- **Anyone you authorise**, such as your financial adviser, solicitor, bookkeeper or a family member

Overseas storage

Some of our software providers store data on servers outside Australia, including in the United States. We use reputable providers with strong security and take reasonable steps to make sure your information is protected wherever it is stored.

Keeping it secure

We take reasonable steps to protect your information from misuse, loss and unauthorised access. These include:

- collecting TFNs, identity documents and financial records only through our secure client portal, never by email or our website enquiry form

- multi-factor authentication on our business accounts
- limiting access to the people who need it to do your work
- encrypted, password-protected devices

How long we keep it

We keep records for as long as we need them to provide our services and as long as the law requires, generally at least five to seven years. When we no longer need information, we securely destroy or de-identify it. We delete TFNs from intake systems once they are recorded in our tax practice software.

Data breaches

If a data breach is likely to cause you serious harm, we'll notify you and the Office of the Australian Information Commissioner, as the Notifiable Data Breaches scheme requires.

Our website

Our website may use cookies and analytics tools to understand how visitors use it. These don't identify you personally, and you can turn off cookies in your browser settings. Our enquiry form and booking system are run by third-party providers, Google Forms and Calendly, which handle your information under their own privacy policies.

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Access, correction and complaints

Accessing and correcting your information

You can ask for a copy of the personal information we hold about you, or ask us to correct it. We'll respond within 30 days. We don't charge for a request, but may charge a reasonable fee for providing large volumes of copies. If we refuse a request, we'll explain why in writing.

Making a complaint

If you think we've mishandled your personal information, please contact Frank first. We'll acknowledge your complaint within 5 business days and aim to resolve it within 30 days. If you're not satisfied with our response:

1

Talk to us

Frank Lauchlan, Privacy Officer
0402 050 841
frank@exigogroup.com.au
PO Box 215, Scarborough WA 6019

2

OAIC

For a privacy complaint
Office of the Australian Information
Commissioner
1300 363 992
oaic.gov.au

3

Tax Practitioners Board

For a complaint about our tax agent
services
tpb.gov.au

Changes to this policy

We may update this policy from time to time. The current version is always on our website.

Last updated: October 2026