

Last updated: 10 July 2026

Policy Summary

This Privacy Policy explains the types of personal information Lee Green may collect, how we collect it, why we use it, when we may disclose it, and how individuals can contact us about access, correction or privacy concerns. It applies to personal information collected through our services, communications, client interactions, employment processes and website.

1. About this policy

Lee Green & Co Pty Ltd respects the privacy of the people we work with and is committed to handling personal information carefully, lawfully and transparently. This Privacy Policy explains the types of personal information we may collect, how we collect it, why we use it, when we may disclose it, and how individuals can contact us about access, correction or privacy concerns.

This policy applies to personal information collected through our services, communications, client interactions, employment processes and website. Lee Green handles personal information in accordance with the Privacy Act 1988 (Cth), the Australian Privacy Principles and any other privacy requirements that apply to the circumstances, including requirements that may apply to website visitors from other jurisdictions.

2. Personal information we may collect

The information Lee Green collects will depend on the nature of our relationship with you and the services, enquiries or interactions involved. It may include:

- name, contact details and identity information;
- date of birth, tax file numbers and bank account details;
- financial, taxation, accounting or business information;
- information about minors where relevant to the services provided;
- employee, contractor or recruitment-related information;
- credit information, where relevant;
- photographs or other records provided to us or created in the course of our work; and
- other information required for professional, legal, regulatory or client service purposes.

In some cases, we may collect sensitive information. Sensitive information may include information about health, racial or ethnic origin, religious or philosophical beliefs, political opinions or associations, trade union membership, criminal history, biometric information, sexual orientation or other information given special protection under privacy law. Lee Green will only collect sensitive information where it is reasonably necessary for our functions or activities and where the collection is permitted by law, including where consent is required.

3. How we collect information

Lee Green usually collects personal information directly from you, including when you contact us, meet with us, complete forms, provide documents, enter into agreements, use our services or communicate with us by phone, email, online platforms or in person.

We may also receive personal information from other people or organisations, such as professional advisers, service providers, government agencies, financial institutions or authorised representatives. If we receive information that we could not lawfully or reasonably have collected, we will take reasonable steps to destroy or de-identify it where required.

When you visit our website, Lee Green may collect information about your use of the site and the device or browser you use to access it. This may include IP address, browser type, device information, pages viewed, links clicked, time spent on pages, referring website, approximate location information and other website usage data.

4. Website data, cookies and tracking technologies

Our website may use cookies, analytics tools, pixels, tags, scripts and similar technologies. These tools may be used to operate the website, maintain security, understand visitor activity, improve website performance, measure the effectiveness of communications and, where applicable, support marketing or remarketing activities.

Some website technologies may be provided by third-party service providers. Where information collected through these tools is personal information, Lee Green will take reasonable steps to ensure it is collected, used and disclosed in a way that is consistent with this policy and applicable privacy law.

Where required by law, Lee Green will provide appropriate notice or seek consent before using non-essential tracking technologies. You may be able to manage or disable cookies through your browser settings, although some website features may not operate as intended if cookies are disabled.

5. Why we use personal information

Lee Green uses personal information for the purpose for which it was collected and for related purposes that a person would reasonably expect. We may use personal information to:

- provide professional services and advice;
- respond to enquiries and manage client relationships;
- verify identity and comply with legal, taxation, accounting, audit or regulatory obligations;
- administer business operations, billing, records management and quality assurance;
- manage employment, contractor or recruitment matters;
- protect the security of our systems, premises, website and information; and
- send updates, invitations or marketing communications where permitted by law.

If Lee Green uses personal information for direct marketing, individuals will be given a practical way to opt out of receiving further marketing communications.

6. When we may disclose personal information

Lee Green may disclose personal information where this is reasonably necessary for our services, business operations or legal obligations. This may include disclosure to:

- government departments, regulators and statutory bodies, including the ATO, ACNC and ASIC;
- professional bodies or quality review programs, including CA ANZ and CPA Australia where applicable;
- banks, financial institutions and superannuation funds;
- auditors, insurers, legal advisers and other professional advisers;
- technology, administration, document management, cloud storage and other service providers;
- related entities or external organisations involved in providing services to you;
- any person or organisation authorised by you; and
- any other party where disclosure is required or permitted by law.

7. Overseas disclosure and third-party services

Lee Green generally seeks to use systems and service providers located in Australia. However, personal information may sometimes be stored, accessed or processed overseas, including where we use cloud, technology, professional or administrative service providers with operations outside Australia, or where an overseas disclosure is necessary for a particular matter.

Where Lee Green discloses personal information to an overseas recipient, we will take reasonable steps required by law to protect that information and to ensure the recipient handles it appropriately.

8. Security and retention

Lee Green takes reasonable steps to protect personal information from misuse, interference, loss, unauthorised access, modification and disclosure. The safeguards we use may include access controls, password protection, multi-factor authentication, secure cloud storage, encryption, firewalls, system monitoring, staff training, confidentiality obligations, secure document exchange methods and physical security measures.

Lee Green retains personal information for as long as it is needed for the purpose for which it was collected, to meet legal or professional obligations, to resolve disputes, or to maintain appropriate business records. When information is no longer required, we will take reasonable steps to destroy or de-identify it, unless we are required or permitted to retain it.

9. Access, correction and choices

You may ask Lee Green to provide access to personal information we hold about you, or to correct information you believe is inaccurate, out of date, incomplete, irrelevant or misleading. We will respond to requests within a reasonable time and in accordance with applicable law.

There is no fee for making an access or correction request. However, Lee Green may charge a reasonable fee for the work involved in locating, retrieving, reviewing or copying extensive material. If a fee applies, we will advise you before proceeding.

Where practicable, you may deal with us anonymously or by using a pseudonym. In many situations, however, Lee Green may not be able to provide services, respond fully or meet legal obligations unless we can identify you.

10. Privacy questions and complaints

If you have a question, access or correction request, or privacy complaint, please contact Lee Green using the contact details published on our website or otherwise provided to you. We will take privacy complaints seriously and will respond within a reasonable time.

If you are not satisfied with our response, you may contact the Office of the Australian Information Commissioner by visiting [oaic.gov.au](https://www.oaic.gov.au).

11. Updates to this policy

Lee Green may update this Privacy Policy from time to time to reflect changes in our practices, technology, legal obligations or regulatory guidance. The current version should be published on our website so that website visitors can easily access it.