

Privacy Policy (Template)

Effective Date: 2 march 2026

1. Introduction

Alpha Omega Systems Aust Pty Ltd (“we”, “us”, “our”) respects your privacy and is committed to protecting any personal information we collect about you (“Personal Data”). This Privacy Policy explains how we collect, use, store, disclose, and safeguard your Personal Data when you interact with our website, services, or communications.

2. What Personal Data We Collect

Category	Examples	How It Is Collected
Identifying information	Name, date of birth, passport/driver’s licence number, Australian Business Number (ABN), Tax File Number (TFN)	Online forms, email, phone, paper documents
Contact details	Email address, telephone/mobile number, postal address	Online forms, email signatures, mail
Financial information	Bank account details, payment card information (via Stripe), invoicing data	Payment gateway, invoices
Professional details	Company name, role, director details, shareholder information, trust/deed details	Intake forms, legal documents
Technical data	IP address, device type, browser, operating system, cookies	Automatically through our website (see § 5)
Communications	Emails, chat transcripts, recorded phone calls (if you consent)	Customer support interactions

3. How We Use Your Personal Data

We use your Personal Data only for the purposes listed below and only when we have a lawful basis (e.g., contract performance, legitimate interest, or your explicit consent):

1. **Provision of Services** – to set up, administer, and manage SMSF, UHT, DUT structures, and related legal documents.
2. **Payment Processing** – to process fees via Stripe and issue receipts/invoices.
3. **Regulatory Compliance** – to satisfy ASIC, ATO, and other statutory reporting obligations.
4. **Customer Support** – to respond to enquiries, provide updates, and resolve issues.
5. **Communications** – to send transactional messages (e.g., confirmation of receipt, status updates) and, where you have opted-in, marketing or promotional material.
6. **Security & Fraud Prevention** – to monitor for unauthorised access, verify identities, and protect our systems.
7. **Record-keeping** – to retain documents for the period required by law (e.g., tax, anti-money-laundering).

4. Disclosure of Personal Data

We do **not** sell or trade your Personal Data. We may share it only with:

Recipient	Reason for Disclosure
Service Providers (e.g., Stripe, SiteGround, email-hosting, document-generation APIs)	To perform the services we have contracted (payment processing, hosting, document creation).
Professional Advisors (e.g., accountants, lawyers, auditors)	To fulfil statutory or regulatory obligations.
Regulators & Government Agencies (e.g., ASIC, ATO, law-enforcement)	When required by law, subpoena, or court order.
Business Partners (e.g., referral accountants)	Only where you have expressly authorised the sharing for the purpose of delivering the service.

All third parties are required (by contract and/or law) to protect your Personal Data with at least the same standard of care we apply.

5. Cookies & Tracking Technologies

Our website uses **essential cookies** to enable basic functionality (session management, security, and preferences). If you opt-in to marketing communications, we may also use **analytics cookies** (e.g., Google Analytics) to understand site usage.

- **Managing Cookies:** You can control or delete cookies through your browser settings. Disabling essential cookies may prevent parts of the site from functioning.
- **Consent:** By continuing to use the site after the cookie banner, you consent to the use of essential cookies. Optional marketing cookies require explicit opt-in.

6. Data Security

We employ reasonable administrative, technical, and physical safeguards, including:

- SSL/TLS encryption for data in transit.
- Secure storage on reputable Australian-based hosting (SiteGround) with firewalls and daily backups.
- Access controls limiting data to authorised personnel only.
- Regular security audits of third-party services (e.g., Stripe, GetEDGE).

While we strive to protect your data, no method of transmission over the internet is 100 % secure; you acknowledge this inherent risk.

7. Retention Period

We retain Personal Data only as long as necessary:

- **Contractual data** – for the duration of the service plus the statutory retention period (typically 7 years for tax/financial records).
- **Marketing consent** – until you withdraw consent.
- **Deleted accounts** – we will securely erase or anonymise data within a reasonable timeframe after account closure.

8. Your Rights

Depending on applicable law (e.g., Australian Privacy Act 1988, GDPR if you have EU residents), you may have the right to:

- **Access** – request a copy of the Personal Data we hold about you.
- **Correction** – ask us to rectify inaccurate or incomplete data.
- **Deletion** – request erasure of your data where lawful.
- **Restriction** – limit the way we process your data.
- **Data portability** – receive your data in a structured, commonly used format.
- **Object** – object to processing for direct marketing or legitimate-interest grounds.

To exercise any of these rights, contact us using the details in § 9. We may need to verify your identity before fulfilling the request.

9. Contact Us

If you have any questions, concerns, or wish to exercise your privacy rights, please contact:

Privacy Officer

Alpha Omega Systems Aust

Email: privacy@alphaomegasystems.com.au

Phone: 0418308051

Postal address: 470 St Kilda Road Melbourne

We will respond within a reasonable timeframe (normally ≤ 30 days).

10. Changes to This Privacy Policy

We may update this Privacy Policy from time to time to reflect changes in our practices or legal requirements. The “Effective Date” at the top will indicate the latest revision. We encourage you to review this page periodically. Continued use of our services after any changes constitutes acceptance of the updated policy.