

## Disclaimer

Every effort has been made to offer the most current, correct and clearly expressed information possible within this site. Nonetheless, inadvertent errors can occur and applicable laws, rules and regulations may change. The information contained in this site is general and is not intended to serve as advice. No warranty is given in relation to the accuracy or reliability of any information. Users should not act or fail to act based on information contained herein. Users are encouraged to contact Wright Doig & Co for advice concerning specific matters before making any decision.

## Disclosure Statement

Wright Doig & Co is a registered tax agent with the Tax Practitioners Board (**the TPB**).

All registered tax agents and registered BAS agents (collectively referred to here as **registered tax practitioners**) must comply with the requirements of the *Tax Agent Services Act 2009*. As part of those obligations we are required to make all current and prospective clients aware of the matters set out below.

### Information about the TPB Register

The TPB is responsible for the registration and regulation of tax practitioners to ensure they comply with the requirements of the *Tax Agent Services Act 2009*.

The TPB maintains a public register that contains details of all tax agents and BAS agents that are currently registered with the TPB, including those whose registration has been suspended. The TPB Register also includes the names of certain unregistered entities and individuals. You can access the TPB Register via the TPB website at [www.tpb.gov.au/public-register](http://www.tpb.gov.au/public-register)

You can search the TPB Register by entering the tax practitioner's name or registration number. The TPB website also provides guidance on how to search the TPB Register, which is available at [www.tpb.gov.au/help-using-tpb-register](http://www.tpb.gov.au/help-using-tpb-register)

### Making a complaint to the TPB

If you have any concerns or issues in relation to the tax agent services provided by our firm, please contact David Wright on 0397252789 or at [davidw@wrightdoig.com.au](mailto:davidw@wrightdoig.com.au). We will work with you to resolve these matters as quickly as possible.

The TPB also has a process for making a complaint about a tax agent service that has been provided by a registered tax practitioner. If you wish to make a complaint to the TPB about the tax agent services that we have provided (or that have been provided by another registered tax practitioner), you can do so via the TPB's website using its online complaints form, which is available at [myprofile.tpb.gov.au/complaints/](http://myprofile.tpb.gov.au/complaints/)

Further information about how to make a complaint to the TPB (including its complaints process) is available at [www.tpb.gov.au/complaints](http://www.tpb.gov.au/complaints)

### General information about rights, responsibilities and obligations

The *Tax Agent Services Act 2009* includes the Code of Professional Conduct (**the Code**) which sets out the professional and ethical standards that registered tax practitioners must comply with.

As a registered tax practitioner, our obligations to clients under the Code include, but are not limited to, acting lawfully in their best interests, acting honestly and with integrity, having arrangements in place to manage any conflicts of interest, taking reasonable care to ensure the taxation laws are complied with and providing services in a competent and timely manner.

Further information about the Code obligations is available on the TPB website at [www.tpb.gov.au/code-professional-conduct](http://www.tpb.gov.au/code-professional-conduct)

Under the taxation laws, clients also have obligations to their registered tax practitioner including, but not limited to, being truthful with the information they provide, keeping the required records and providing them (if required) on a timely basis, advising of any changes that may impact the tax agent services to be provided and being co-operative with their tax practitioner's requests and meeting their due dates.

More information about the obligations of clients and registered tax practitioners is available on the TPB website at [www.tpb.gov.au/obligations](http://www.tpb.gov.au/obligations) and in its factsheet, [Information for Clients](#).

#### Prescribed events within the last five years

Registered tax practitioners are required to advise their clients if any of the following events have occurred within the last five years (but not before 1 July 2022):

- Their registration was suspended or terminated by the TPB.
- They were an undischarged bankrupt or went into external administration.
- They were convicted of a serious taxation offence.
- They were convicted of an offence involving fraud or dishonesty.
- They were serving, or were sentenced to, a term of imprisonment in Australia for six months or more.
- They were penalised, subject to an injunction, or been subject to an order for breaching a voluntary undertaking, for being a promoter of a tax exploitation scheme.
- They were penalised, subject to an injunction, or been subject to an order for breaching a voluntary undertaking, for implementing a scheme that has been promoted on the basis of conformity with a public ruling, private ruling or oral ruling in a way that is materially different from that described in the ruling.
- They were penalised, subject to an injunction, or been subject to an order for breaching a voluntary undertaking, for promoting on the basis of conformity with a public ruling, private ruling or oral ruling, a scheme that is materially different from that described in the ruling.
- The Federal Court has ordered them to pay a pecuniary penalty for contravening a civil penalty provision under the *Tax Agent Services Act 2009*.

Accordingly, we advise that none of the above events have occurred during the relevant period.

#### Registration subject to conditions

Registered tax practitioners are required to advise clients of any conditions currently imposed on the registration by the TPB. A 'condition' limits the scope of services they can provide.

We advise that there are no conditions currently imposed by the TPB on my registration\* / the firm's registration.

The information disclosed on this page was last updated on 25 June 2025.

#### Privacy policy

#### Consideration

Wright Doig & Co values and respects privacy and personal information. We protect the personal information of clients, customers, employees, contractors and others. Wright Doig &

Co is a CPA Practice and is committed to providing you with the highest quality professional service which includes protecting your privacy. Wright Doig & Co is bound by the Privacy Act 1988 and must comply with the National Privacy Principles.

### **Collection of personal information**

We will collect personal information in an open and transparent manner to allow us to provide a professional service to you. We collect this information in order to, provide our services, maintain contact with you , keep you informed of the services we offer and current developments, provide administration and manage your file.

Our ability to provide you with a comprehensive service is dependent on us obtaining certain personal information. This information may include:

- Your name
- Your personal contact details
- Business name
- Business contact details
- Employment details and history
- Tax File Number
- Australian Business Number
- Australian Company Number
- Bank details
- Director and shareholding details
- Details of your current financial circumstances
- Employee details
- Documentation that allows us to satisfy the identification and verification obligations with the Anti-Money Laundering and Counter-Terrorism Financing Legislation.

Failure to obtain such information may limit our ability to provide services you require.

We generally will not collect sensitive information, however, if necessary we will gain your explicit consent to collect and use this information.

It is important that the personal information we hold is up to date and accurate. If you become aware or believe any personal information we hold is inaccurate, incomplete or out of date please contact us.

### **Use of information**

We will only use your personal information to perform professional services, respond to your requests or to provide you with further information about Wright Doig & Co.

We may use your personal information to market our services to you, including by email. If you do not wish to receive such information you can choose to unsubscribe from this service.

Personal information is held for as long as it is required to fulfil the purposes for which it was collected or as required by law.

We may share your details with third parties who we contract to assist in providing services requested by you. Those third parties may include service providers who assist us in performing our services such as mailing houses, our professional advisers, third parties for the purposes of verification of accounts payment processes, experts who are contracted as part of your engagement, Quality assurance auditors appointed under the by-laws of CPA Australia, IT Technicians when providing support. We require that these organisations protect your information in the same way we do.

Information that we collect may from time to time be stored, processed in or transferred between parties located in countries outside of Australia.

If there is a change of control in our business or a sale or transfer of business assets, we reserve the right to transfer to the extent permissible at law our user databases, together with any personal information and non-personal information contained in those databases. This information may be disclosed to a potential purchase under an agreement to maintain confidentiality. We would seek to only disclose information in good faith and where required by any of the above circumstances.

We may from time to time need to disclose personal information to comply with a legal requirement, such as a law, regulation, court order, subpoena, warrant, in the course of a legal proceeding or in response to a law enforcement agency request

### **Storage and Security**

Wright Doig & Co takes reasonable measures and precautions to protect the personal information we hold from such risks as loss or unauthorised access, destruction, modification or disclosure. Reasonable steps are taken to destroy or permanently de-identify any personal information no longer required.

We may also store, process or back-up your personal information on computer servers or networks which are located overseas or in 'the cloud', including where services are performed by service providers who are located overseas. Where your personal information is provided to overseas entities, we will take all necessary steps to ensure that the security of the information is maintained and that it is used consistent with this policy and our obligations under the Privacy act.

The firm uses physical and electronic procedures to ensure the privacy of information is safeguarded.

Please note the internet is not secure and we cannot guarantee the security of any information sent to us via the internet.

Any personal information or content that you contribute to any social media applications can be real, collected and used by others. Wright Doig & Co has no control over this. We are not responsible for any use, misuse or misappropriation by others of your personal information for content that you contribute.

### **Access**

At any time you may request access to your personal information by contacting the partner who manages your relationship or by emailing [admin@wrightdoig.com.au](mailto:admin@wrightdoig.com.au). Requests will be dealt with as quickly as possible and we will endeavour to respond within 21 days. In some circumstances we may refuse to give you access to personal information and in these circumstances we will explain why (e.g. it may be a conflict of interest to provide the information).

Wright Doig & Co enforces this policy on all employees and its values are upheld. If you feel any concerns or have any questions regarding this content we encourage you to contact our office on (03)9725 2789 or [admin@wrightdoig.com.au](mailto:admin@wrightdoig.com.au)