



PRIVACY POLICY

Effective date: 01 July 2026

This Privacy Policy explains how Blue Oak Accounting collects, uses, stores, protects and otherwise processes personal information. It is intended for use on the Blue Oak Accounting website and in connection with enquiries and services provided by Blue Oak Accounting.

This policy has been drafted with reference to South African privacy and information-access requirements, including the Protection of Personal Information Act 4 of 2013 (POPIA). It is a practical website template and should be reviewed by a South African attorney or privacy professional before publication, particularly once Blue Oak Accounting's exact legal entity, service arrangements, software providers and data flows are confirmed.

1. WHO WE ARE

Blue Oak Accounting ("Blue Oak Accounting", "we", "us" or "our") is responsible for the processing of personal information described in this Privacy Policy.

Legal name: Blue Oak Accounting

Registration number: 2011/072388/23

Physical/business address: 269 Aries Street, Waterkloof Ridge, Pretoria, 0181

Email: Sales@Blue-Oak-Accounting.com

Telephone: +27(0)83 292 2573

Information Officer / privacy contact: Elizabeth Lindeque

Website: www.Blue-Oak-Accounting.com

For purposes of POPIA, Blue Oak Accounting acts as the responsible party where it determines the purpose and means of processing personal information.

2. THE INFORMATION WE COLLECT

Depending on how you interact with us, we may collect and process:

- ☐ Identification and contact information, such as your name, email address, telephone number and business name.
- ☐ Information you provide when you submit an enquiry, request a consultation or contact us.
- ☐ Information required to provide accounting, bookkeeping, tax, payroll or HR support.
- ☐ Client and business records supplied to us for purposes of performing agreed services.
- ☐ Employee or payroll information supplied by a client where this is necessary to provide payroll or HR-related services.
- ☐ Billing, payment and transaction information where required for our business relationship.
- ☐ Website and technical information, such as IP address, browser/device information and information about how the website is used, where collected through our website or service providers.
- ☐ Information contained in communications with us.

We will generally seek to collect only information that is reasonably necessary for a specific and lawful purpose.

3. HOW WE COLLECT INFORMATION

We may collect personal information:

- ☐ Directly from you when you complete a website form, email us, telephone us or otherwise communicate with us.
- ☐ From your business or authorised representatives when you engage us for services.
- ☐ From employees, contractors or service providers acting on your behalf where appropriate.
- ☐ From public or lawful third-party sources where permitted by law.
- ☐ Automatically through website technologies such as cookies or similar technologies, where applicable.

4. WHY WE USE PERSONAL INFORMATION

We may process personal information for purposes including:

- ☐ Responding to enquiries and requests for consultations.
- ☐ Communicating with prospective and existing clients.
- ☐ Providing accounting, bookkeeping, tax, payroll and HR support that we have agreed to provide.
- ☐ Preparing quotations, engagement documentation, invoices and related records.
- ☐ Managing our client relationships and administering our business.
- ☐ Meeting legal, regulatory, accounting and tax obligations.
- ☐ Maintaining appropriate records and audit trails.
- ☐ Protecting our website, systems, clients and business against fraud, misuse, security incidents or other unlawful activity.
- ☐ Improving our services and website, where permitted by law.
- ☐ Sending marketing communications where we have a lawful basis to do so and, where required, have obtained your consent.

Where we process personal information based on consent, you may withdraw that consent, subject to any lawful consequences or other legal basis for continued processing.

5. LAWFUL PROCESSING

We will process personal information in accordance with applicable South African law and the conditions for lawful processing under POPIA.

Depending on the circumstances, our lawful basis may include:

- ☐ Your consent.
 - ☐ Taking steps at your request before entering into a contract.
 - ☐ Performing a contract or providing services you have requested.
 - ☐ Complying with a legal obligation.
 - ☐ Protecting legitimate interests, where permitted by law and where those interests do not unlawfully override your rights.
- We will seek to process information fairly and transparently and only for defined, legitimate purposes.

6. SHARING PERSONAL INFORMATION

We may share personal information where reasonably necessary and lawful with:

- ☐ Our employees, contractors and professional advisers who need the information to perform their functions.
- ☐ Technology, hosting, cloud, accounting, payroll, communications and other service providers who support our business.
- ☐ Banks, payment providers or other service providers where necessary for a transaction.
- ☐ SARS, regulators, government authorities or other bodies where disclosure is required or permitted by law.
- ☐ Professional advisers, auditors, insurers or legal representatives where reasonably necessary.
- ☐ A purchaser, successor or professional adviser in connection with a lawful business restructuring, sale or transfer, subject to applicable confidentiality and privacy requirements.

We do not sell personal information as a commercial commodity.

Where we appoint an operator or service provider to process personal information on our behalf, we will take appropriate steps to require appropriate confidentiality and security measures.

7. CROSS-BORDER PROCESSING

Some of our technology or service providers may store or process information outside South Africa. Where personal information is transferred outside South Africa, we will take reasonable steps to ensure that the transfer is permitted by POPIA and that appropriate safeguards apply.

The actual countries and providers involved may depend on the software and services used by Blue Oak Accounting. We will update this policy where material changes to our processing arrangements require further disclosure.

8. RETENTION OF PERSONAL INFORMATION

We retain personal information only for as long as reasonably necessary for the purpose for which it was collected, to maintain our business and client records, to comply with legal or regulatory obligations, to resolve disputes, and to protect our legitimate interests.

Certain accounting, tax, payroll, employment and business records may need to be retained for periods prescribed by applicable South African laws or for legitimate legal purposes. Retention periods may therefore differ depending on the type of information and the relationship with the data subject.

When personal information is no longer required and there is no lawful reason to retain it, we will take reasonable steps to securely delete, destroy or de-identify it.

9. INFORMATION SECURITY

We take reasonable technical and organisational measures designed to protect personal information against loss, damage, unauthorised access, unauthorised disclosure and other unlawful processing.

Depending on the circumstances, safeguards may include access controls, password protection, secure systems, user permissions, confidentiality obligations, backups, secure communications and appropriate security procedures.

No website, email service or electronic transmission can be guaranteed to be completely secure. If we become aware of a security compromise involving personal information, we will take appropriate steps in accordance with applicable law.

10. YOUR RIGHTS

Subject to applicable law and any lawful limitations, you may have rights to:

- ☐ Ask whether we hold personal information about you.
 - ☐ Request access to personal information we hold about you.
 - ☐ Request correction or updating of inaccurate, incomplete or outdated information.
 - ☐ Request deletion or destruction of personal information where the law permits.
 - ☐ Object to certain processing.
 - ☐ Withdraw consent where processing is based on consent.
 - ☐ Object to direct marketing communications.
 - ☐ Lodge a complaint with the Information Regulator if you believe your personal information has been processed unlawfully.
- Requests should be sent to: Sales@Blue-Oak-Accounting.com

We may need to verify your identity before responding to a request and may be entitled to refuse or limit a request where permitted by law.

11. DIRECT MARKETING

We may contact prospective or existing clients about our services where permitted by applicable law.

We will not send unsolicited electronic direct marketing where consent is required unless a lawful exception applies.

Where consent is required, we will provide an appropriate opportunity to opt in and will respect requests to stop receiving marketing communications.

Every marketing communication should identify Blue Oak Accounting as the sender and provide an appropriate way to request that further marketing communications stop.

12. COOKIES AND WEBSITE TECHNOLOGIES

Our website may use cookies and similar technologies to make the website function, understand website usage, improve performance and, where applicable, support analytics or other features provided by third-party services. The exact cookies and technologies used may depend on the Wix website configuration and any third-party services enabled on the website.

You can manage or block cookies through your browser settings. Blocking certain cookies may affect website functionality.

If we introduce cookies or tracking technologies that require additional notice or consent under applicable law, we will provide the appropriate notice or controls.

13. CHILDREN'S INFORMATION

Our website and services are intended primarily for businesses and adults. We do not knowingly seek to collect personal information from children, where prohibited, by applicable law.

If you believe that a child has provided personal information to us unlawfully, please contact us so that we can investigate and take appropriate action.

14. LINKS TO OTHER WEBSITES

Our website may contain links to third-party websites or services. We are not responsible for the privacy practices, security or content of third-party websites. You should review the privacy policies of those websites before providing personal information.

15. PAIA AND ACCESS TO INFORMATION

Blue Oak Accounting recognises that the Promotion of Access to Information Act 2 of 2000 (PAIA) may apply to requests for access to records.

Where applicable, information about how to request access to records will be made available in our PAIA Manual or other prescribed information.

PAIA contact: ELIZABETH LINDEQUE
PAIA email: Sales@Blue-Oak-Accounting.com
PAIA Manual: on request

16. COMPLAINTS

If you have a concern about how we process your personal information, please contact us first so that we can investigate and try to resolve the matter.

Privacy complaints should be sent to:
Email: Sales@Blue-Oak-Accounting.com
Telephone: +27(0)83 292 2573
Address: 269 Aries Street, Waterkloof Ridge, Pretoria, 0181

You also have the right, where applicable, to lodge a complaint with the Information Regulator of South Africa.

17. CHANGES TO THIS PRIVACY POLICY

We may update this Privacy Policy from time to time to reflect changes in our services, technology, legal obligations or data-processing practices.

The latest version will be published on our website with its effective date. We encourage you to review the policy periodically.

18. CONTACT US

If you have questions about this Privacy Policy or how we process personal information, please contact:

Blue Oak Accounting

Legal name: Blue Oak Accounting

Email: Sales@Blue-Oak-Accounting.com

Telephone: +27(0)83 292 2573

Address: 269 Aries Street, Waterkloof Ridge, Pretoria, 0181

Information Officer / privacy contact: Elizabeth Lindeque

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IMPORTANT LEGAL NOTE

This document is a practical website privacy-policy template and is not legal advice. Before publishing it, Blue Oak Accounting should confirm its legal entity details, Information Officer details, software/cloud providers, cookie and analytics configuration, retention practices, marketing practices and client-data arrangements. A South African legal professional should review the final version for the business's specific circumstances.

REFERENCE LEGISLATION

- Protection of Personal Information Act 4 of 2013 (POPIA), including the conditions for lawful processing and data-subject participation.
- Promotion of Access to Information Act 2 of 2000 (PAIA), including applicable access-to-information obligations.

Official sources: Department of Justice and Constitutional Development and the Information Regulator of South Africa.