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VENDOR DUE-DILIGENCE STATEMENT

Security & Data Handling Statement

This statement sets out where BeforeMay stores and processes a practice's client data, who can access it, which independent certifications its providers hold, and how incidents are handled. It is provided to support a practice's own assessment of BeforeMay as a service provider.

Document	Security & Data Handling Statement	Version	1.1
Issued by	Outblock Pty Ltd (BeforeMay)	Effective	18 November 2026
Classification	Public	Review	At least every 12 months, and before any change of provider that handles client documents
Governing document	BeforeMay Privacy Policy, beforemay.com.au/privacy. Where this statement and the Privacy Policy differ, the Privacy Policy prevails.		

1 Summary

1.1 Client documents are **stored at rest in Sydney, Australia**, and all processing BeforeMay operates itself runs in Australia.

1.2 Before any AI step, **Tax File Numbers, Medicare numbers, passport and driver licence numbers and email addresses are removed** on BeforeMay's own service in Sydney. If that step cannot run, the job stops; the original is never sent instead.

1.3 Workpaper drafting and review by Anthropic's Claude run on **Amazon Bedrock in Australia**, with nothing stored. Analysis of document text and some drafting run on Fireworks AI in the **United States**. No provider may use client data to train AI models.

1.4 Every provider that holds or processes client documents holds an **independent SOC 2 Type II report** or equivalent certification (section 3).

1.5 A practice is notified of a data breach affecting its data **without undue delay** (section 8).

2 Scope

2.1 This statement covers BeforeMay Workpapers and the client portal, operated by Outblock Pty Ltd. It concerns the documents and records a practice and its clients upload, the workpapers BeforeMay prepares from them, and the accounts of the practice's members.

2.2 BeforeMay prepares a workpaper for review. It does not lodge returns. Figures, tax treatment and lodgement remain the responsibility of the practice's registered agent.

3 Service providers handling client documents

3.1 The providers below hold or process client documents. Each acts on BeforeMay's instructions under written data-protection terms. The certifications are each provider's own, published by that provider; they are not certifications of BeforeMay.

Provider	Purpose	Location	Independent certifications
Supabase, hosted on Amazon Web Services	Database, file storage and sign-in	Sydney, AU	SOC 2 Type II (Supabase); ISO 27001 (AWS); IRAP PROTECTED (AWS)
Fly.io	BeforeMay's own processing services	Sydney, AU	SOC 2 Type II
Microsoft Azure Document Intelligence	Reading scanned pages and photos; each page deleted within 24 hours	Australia East (NSW)	ISO 27001; SOC 2 Type II
Anthropic Claude, run on Amazon Bedrock (AWS)	AI drafting and independent review; nothing stored	Sydney & Melbourne, AU	SOC 2 (Amazon Bedrock); ISO 27001 (Amazon Bedrock); IRAP PROTECTED (Amazon Bedrock)
Fireworks AI	AI analysis of document text and drafting, through its US-only service	United States	SOC 2 Type II

3.2 Other providers process account data but not client documents, including website hosting, payments, email delivery and product analytics. The complete list, with the country each processes in, is section 6 of the Privacy Policy.

3.3 BeforeMay will tell a practice **before** a provider that handles its documents is added or changed.

4 Data location and cross-border disclosure

4.1 Documents, extracted data and workpapers are stored at rest in Sydney. Text recognition runs in Australia: on BeforeMay's own service for text-layer documents, and on Microsoft Azure in Australia East for scans. No document is sent outside Australia to be read.

4.2 Drafting and review by Anthropic's Claude run on Amazon Bedrock in AWS's Australian regions. Only analysis of document text and some drafting, on Fireworks AI, leave Australia. Before any AI step, every document passes through BeforeMay's identifier-removal service in Sydney, which treats identifiers as follows.

Identifier	Treatment before any AI step
Tax File Number, Medicare number, passport number, driver licence number	Removed from the text and from the source document
Email address	Replaced by a substitute and removed from the source document
Cryptocurrency wallet address, transaction hash, exchange user ID	Replaced by a code where recognised; not every format is recognised
Phone number, date of birth	Removed where a label (for example "Phone", "Date of birth") appears beside it
Bank account number, BSB	Replaced by a code in the text; the source document is sent with them in it

4.3 The taxpayer's name and the recognised text of their documents are provided to the AI provider handling a step, because a workpaper cannot be prepared without them.

4.4 Some providers are subject to the laws of the countries they operate in. BeforeMay does not volunteer client information to any authority, requires valid legal process for any request it receives, and tells the affected practice unless prohibited.

5 Access control

5.1 **Practice isolation.** Every record is scoped to its practice and protected by database row-level security keyed to practice membership. One practice cannot read another's data.

5.2 **Roles.** Members are Owner, Admin or Member. Only an Owner or Admin can invite, remove or change the access of a member.

5.3 **Mandatory second factor.** Every member sets up an authenticator app or a passkey, verified server-side. A signed-in session locks after 30 minutes of inactivity.

5.4 **Client portal.** A client can reach only their own files and invoices, through a link whose token is stored only as a hash, validated on every request and revocable at any time.

5.5 **BeforeMay personnel.** A BeforeMay operator can view a practice's data only by opening a support session, which records the operator, the practice, the reason and the start and end times, and is subject to the same membership checks as any member.

6 Encryption and storage

6.1 All connections to the application, the database and BeforeMay's services are encrypted in transit using TLS.

6.2 The database and file storage are encrypted at rest by the storage provider.

6.3 File storage is private. Files are served only through signed links that expire within minutes, issued after practice membership or a valid portal token is verified.

6.4 Provider credentials and privileged keys are held server-side only and are never exposed to the browser. Every privileged server function verifies the caller before acting, and security-relevant actions are logged.

7 Retention and deletion

Data	Retention
Uploaded documents and extracted data	While the client or job is active; deleted on deletion by a practice administrator or on account closure
A deleted case	Held in a recoverable trash for 30 days, then purged automatically
Tax File Number on a client record	While the practice needs it to prepare and lodge; deleted with the client record or on request
Scanned pages read by Microsoft Azure	Deleted by Microsoft within 24 hours
Audit events	At least 12 months; purged after 18 months
Email drafts and send logs	7 years, unless the practice chooses a shorter period

7.1 Deleting data from BeforeMay does not by itself delete a copy held by an AI provider; those copies follow the provider retention terms in section 9.

8 Incident response and breach notification

8.1 On becoming aware of unauthorised access to, disclosure of, or loss of personal information, BeforeMay will contain and assess the incident promptly.

8.2 BeforeMay will notify each affected practice **without undue delay**, stating what is known, what is not yet known, and the steps being taken.

8.3 Where the incident is an eligible data breach likely to result in serious harm, BeforeMay will notify the Office of the Australian Information Commissioner and, in co-ordination with the practice, the individuals affected. The Notifiable Data Breaches scheme applies to BeforeMay in respect of Tax File Number information regardless of its size; the same process is applied to all client data.

8.4 Where an incident occurs at a provider, BeforeMay will pass on what that provider reports.

> Report a suspected security or privacy incident to **privacy@beforemay.com.au**.

9 Use of artificial intelligence

9.1 **No training.** AI providers are engaged under terms that prohibit using client information to train general AI models. BeforeMay does not opt in to sharing client content for training.

9.2 **Provider retention.** Neither AI service keeps client content. Claude runs on Amazon Bedrock with data retention set to none, so no request or response is written to storage, and the content is not shared with Anthropic. Fireworks AI retains no prompt or response content by default for the models used.

9.3 **Independent review.** Each workpaper is reviewed by a different AI provider from the one that drafted it.

9.4 **Human responsibility.** AI output is a preparation aid. A figure the evidence does not settle is marked outstanding rather than estimated, and the practice's registered agent reviews and signs.

9.5 **Client consent.** A practice's use of BeforeMay is not, by itself, the consent the practice may need from its own client before disclosing that client's information to a third party. That permission sits between the practice and its client.

10 Assurance status

10.1 BeforeMay relies on the independent certifications of the providers in section 3. BeforeMay does not currently hold a SOC 2 or ISO 27001 certification of its own, and has not yet commissioned an independent penetration test. This statement will be updated as that changes.

10.2 A practice with security questions not answered here may contact **privacy@beforemay.com.au**. Acknowledgement is given within 7 days and a substantive response within 30 days.

Authorised by
Hao Fu, Co-founder, Outblock Pty Ltd

Date
18 November 2026

This statement describes BeforeMay's practices as at its effective date and does not of itself create contractual obligations beyond those in BeforeMay's Terms and Conditions and Privacy Policy. Provider certifications are as published by each provider; their current status can be confirmed on the provider's own trust or compliance page.