

Canberra Advice Financial Planning Privacy Policy

This document outlines the Canberra Advice Pty Ltd (Canberra Advice Financial Planning) policy on how we manage personal information we hold about our customers.

It is the policy of Canberra Advice Financial Planning to respect the confidentiality of your personal information and protect your privacy in line with the Australian Privacy Principles contained in the Privacy Act 1988 (Cth) (Schedule 1), and the National Privacy Principles outlined in the Privacy Act for residents of the ACT. This policy will be reviewed from time to time to take account new laws and technology, changes to our operations and practices and to make sure it remains appropriate to the changing environment. Any information we hold will be governed by the most current Canberra Advice Financial Planning Privacy Policy.

Canberra Advice Financial Planning recognises the importance of protecting the privacy of any personally identifiable information that we collect. Personal information is collected from you to provide our services and for the purposes and in the manners outlined below. It is used by us to provide you with the products and services that you request and to provide information to you on products and services that are offered through us. These may include investment, retirement, financial planning, banking, credit, life insurance products and enhanced customer services that may be made available by us or by a financial planner.

We may share your personal information with other companies within Canberra Advice Financial Planning and external product and service providers. We prohibit third parties from using your personal information except for the specific purpose for which we supply it.

You may write to us to withdraw your consent for the use of your personal information. However, without your consent to use your personal information we may not be able to provide you with the product or services you are seeking.

We may also use personal information as required by law. For example, legislation such as the Anti-Money Laundering and Counter Terrorism Financing Act, Court Orders or Statutory Notices and Taxation Law.

The personal information is collected by Canberra Advice Financial Planning either from you or from a source approved by you and may include your contact details, date of birth, financial and investment details and Tax File Number (if you have chosen to quote it). Over time, this will be supplemented with other information necessary to allow Canberra Advice Financial Planning to continue to provide services to you.

We act to keep the personal information that you have provided us secure. We will use the latest techniques and processes, in keeping in line with current professional standards, to protect your personal information from misuse, loss and unauthorised access, modification or disclosure. We take all necessary precautions to ensure that our online systems are secure.

There are restrictions on collecting sensitive personal information about you. Sensitive information relates to a person's racial or ethnic origin, political opinions or membership of political bodies, religious beliefs or affiliations, philosophical beliefs, membership of a professional or trade association or trade union, sexual preferences or activities, criminal record, state of health and medical history.

Some sensitive information is usually needed for applications for death, sickness and disability insurance and to manage claims on those products. It may also be relevant for applications and management of credit as well as for other applications relating to the provision and operation of a financial service or product.

It is Canberra Advice Financial Planning policy that sensitive information will be used and disclosed only for the purposes for which it was provided, unless the customer agrees otherwise or the use or disclosure of this information is allowed by law. Documents asking for sensitive information will explain this. The way we use tax file numbers and information received from a credit reporting agency about an individual is also restricted by law.

As a client of Canberra Advice Financial Planning, you can request to see the information we hold about you and to have it corrected if required. To find out more about the personal information we hold and how it is handled, or if you wish to make a complaint about a possible breach of privacy, please contact us:

Phone: 0422 354 617

Email: info@canberraadvice.com.au

Canberra Advice Financial Planning
Level 8
121 Marcus Clarke Street
Canberra, ACT 2601

We offer an internal complaint resolution scheme to all our customers. If you are still not satisfied with our response, we will tell you about external dispute organisations that are available to help you resolve your complaints.

If you would like more information about the Privacy Act 1988 (Cth), you can contact the Office of the Australian Information Commissioner.

Once you decide to acquire a financial product or financial service from a product provider that is not Canberra Advice Financial Planning, responsibility for all complaints, including complaints about the handling of personal information, lies with the holder of the relevant Australian Financial Services License (AFSL) or Registrable Superannuation Entity License (RSE). The relevant responsible entities will be identified in the associated Product Disclosure Statement or Financial Services Guide as required for each product and service.