

Adviser Services Pty Ltd Privacy Policy

In this Privacy Policy: "Adviser Services", "we", "our", and "us" means Adviser Services Pty Ltd.

National Privacy Principles

Adviser Services is bound by the National Privacy Principles.

What type of information does Adviser Services hold?

The type of information we hold varies depending on the type of product or service we provide to you. For example, Adviser Services will hold different information about you if you have facilitated an Investment or Insurance through us than we will hold if you have organised finance through us.

In general, Adviser Services may hold the following personal information:

- Name and address
- Date of birth
- Contact details, including your telephone number
- Your gender

Adviser Services may also hold the following information about you:

- Occupation
- Tax file number, where you have given it to us
- Health information (for some types of insurance)
- Information about your financial situation
- Insurance claim information, where this is relevant
- Your employer's name and address
- Your salary
- The names and addresses of your dependents or beneficiaries
- Other information that you have given us

How does Adviser Services use this information?

We use this information to source appropriate products and services for you. These services and products may relate to financial planning, accounting, legal, lending and real estate services.

We may also use the information to send you material about other financial products or services. If you do not want to receive this type of material, tell us and we will stop. Our contact details are set out at the end of this document.

Does Adviser Services usually share information with other companies?

Adviser Services do not usually share information with anyone else other than their internal staff, related entities, your financial product providers, and third party advisers on a restricted basis. They do share information as required by law e.g. the ATO, Centrelink.

We do not sell mailing lists.

How does Adviser Services handle a request for access to personal information?

Under the National Privacy Principles, you are generally entitled to access the information we hold about you. Where you are entitled to access, the time we require to give you access will depend on the type of information requested. If we can, we will answer your question immediately. We will also try to answer you in the same way that you ask, for example, if you telephone to ask for the information we will, if practicable, give you that information over the telephone. We will generally respond to a written request in writing.

Sometimes, we will ask that you put your request in writing, for example, where you want copies of material or access to older information or files which are not current or it is necessary for us to retain a record of your request. We may also ask you to identify yourself to our satisfaction. If we are entitled under the National Privacy Principles to refuse to give you access, we will tell you and provide reasons.

How does Adviser Services protect personal information that may be transferred overseas?

Adviser Services may transfer personal information outside Australia to countries whose privacy laws do not provide the same level of protection as Australia's. Adviser Services may also use overseas facilities or contractors to process or back-up our information or to provide certain services to you. As a result, we may transfer your personal information to our overseas facilities or contractors for these purposes. Any such transfer of information does not change any of our commitments to safeguard your privacy and the information remains subject to existing confidentiality obligations.

What if some of the information Adviser Services holds is wrong?

Please tell us. We want our records to be accurate, complete and up to date. Unless we disagree with you about the accuracy or completeness of a record, we will generally correct it on request, (or suggest alternative arrangements for updating our records). If we disagree with you, we will give you our reasons.

How do I make further enquiries or complain about a breach of privacy?

If you require more information about the way Adviser Services manages personal information or wish to make a complaint about a breach of your privacy, please contact us (see below for details) and ask to speak to our Responsible Manager, who is responsible for privacy issues.

Changes to this Privacy Policy

We reserve the right to review and amend this Privacy Policy from time to time and to notify you by posting an updated version on our website

How can I contact Adviser Services?

Write to us	Responsible Manager Adviser Services Pty Ltd PO Box 332 Black Rock Vic 3193
Call us	03 9589 8899
Email us	emailus@adviserservices.com.au