



# WEALTHINVESTORS

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Our Privacy Policy



## **Our Privacy Policy**

We understand that privacy is important to you. Wealth Investors Australia is committed to protecting your privacy and personal information.

This Privacy Policy relates to the collection and use of personal information you may provide to us through this website.

Personal information is any information that can identify you. This may include sensitive information such as your health, race, religion or political beliefs. We may ask for sensitive information where it is required by law or where the information is needed to enable us to provide you with the financial products or services you need. In either case, we may collect such information incidentally. By providing us with sensitive personal information, you consent to us using the information subject to applicable laws.

In this website, “we”, “our”, and “us” may refer to Wealth Investors Australia as a company. The following information provides an overview of how we will protect your privacy.

### **Collection of personal information**

We may collect and hold personal information about you, information you provide to us, including fact finder forms or when you speak directly with our staff.

Please note that if we collect personal information electronically, we may do so by using “cookies”. A cookie is a packet of information which is sent by our website to your computer to track your use of our website and to allow you to effectively access your account information. This information is collected for security purposes and to protect the integrity of your account details.

### **Use and disclosure of personal information**

Your personal information is used only for the purpose for which it is collected, and that is for the purpose of providing you with the financial products and/or services you have requested or for such other purposes:

- notify you about our other services and marketing activities from time-to-time; and
- manage our relationship with you.

**We will not disclose your personal information unless the disclosure:**

- is required by law;
- has your consent (express or implied);
- is to product providers you were placed in by a Wealth Investors Financial Adviser;
- is to financial planners, brokers and those who are authorised by us to review our clients' needs and circumstances from time-to-time;
- is to other entities within the Wealth Investors group, but only if this is necessary in order for us to provide you with services; or
- is to organisations with whom we have a business relationship that have strict confidentiality rules. You agree that not all recipients of your personal information may have privacy policies
- similar to ours and you consent to the disclosure of your personal information for those purposes.

If at any time you no longer wish to be notified about our products, services or promotions, please let us know.

We will otherwise not transfer your personal information outside Australia or use, sell or disclose your personal information without your consent, unless permitted to do so under the Privacy Act or required to by law.

### **Security**

We strive to ensure the security, integrity and privacy of personal information submitted to our site, and we review and update our security measures in light of current technologies. Unfortunately, no data transmission over the Internet can be guaranteed to be totally secure.

However, we will endeavour to take all reasonable steps to protect the personal information you may transmit to us.

In addition, our employees and the contractors who provide services related to our information systems are obliged to respect the confidentiality of any personal

information held by us. However, we will not be held responsible for events arising from unauthorised access to your personal information.

### **Access to your personal information**

You can request us to provide you with access to personal information we hold about you. We may allow you to inspect your personal information in person, or provide you with copies or a summary of relevant documents, depending on what we consider most appropriate in the circumstances. Any charge we make for providing access will be reasonable.

Please note that we need not provide access to personal information if the request is frivolous, or where to provide access would pose a threat to health or public safety, unreasonable interference with another person's privacy, or give rise to a breach of the law. If we refuse access, we will provide you with reasons for doing so.

### **Identifiers (Tax File numbers)**

In some circumstances we are required to collect government identifiers, for example your tax file number. We will not use or disclose this information other than when required to do so by law or when consented to by you.

### **Sensitive Information**

Without your consent for instance where information is provided by you for insurance or risk purposes, we will not collect sensitive information about you. Exceptions to this include where the information is required by law, or for the establishment exercise or defence of a legal claim.

### **Links to other websites**

We provide links to other websites. These linked sites are not under our control, and we cannot accept responsibility for the conduct of companies linked to our website. Before disclosing your personal information on any other website, we advise you to examine the terms and conditions of using that website and its privacy statement.

## **Contacting Us and Privacy Issues**

You can obtain further information on request about the way in which we manage the personal information that we hold or you can raise any privacy issues with us by contacting us on 1300 022 866.

If you wish to complain about any breach or potential breach of the privacy policy or the Australian Privacy Principles, You should contact the Complaints Manager. You may also contact the Office of the Australian Information Commissioner who may investigate your concern further.

## **Further privacy information**

For more information about privacy issues in Australia and protecting your privacy, visit the Office of the Australian Information Commissioner's website [www.oaic.gov.au](http://www.oaic.gov.au)



# WEALTHINVESTORS

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