



AdviceWrite Pty Ltd ACN 148 080 899

Privacy Policy

The privacy of your personal information has always been important to us at AdviceWrite. In addition to complying with existing laws that govern confidential information that you provide to us, we are also required to comply with the National Privacy Principles. We will always seek to comply with the National Privacy Principles as well as other applicable laws affecting your personal information.

This privacy policy outlines our policy on how we manage your and your client's personal information. It also sets out generally what sort of personal information we hold, for what purposes and how we collect, hold, use and disclose that information.

Collecting Your Personal Information

Your and your client's personal information will be collected and held by AdviceWrite, for the purposes of:

- providing you with the paraplanning and consultancy services that you have requested;
- managing our relationship with you; or
- contacting you (not your clients) about service offerings in which you may be interested.

Given the nature of our business, the personal information collected may include sensitive information such as health information and memberships of professional or trade associations. We will only collect your and your client's personal information from you.

How Your Personal Information is Held

Your personal information is generally held in client files or a computer database. Your personal information may also be held in a secure archiving facility.

We will seek to ensure that we take reasonable steps to ensure that the personal information that we hold is protected from misuse and loss and from unauthorised access, modification and disclosure. Some of the measures that we have adopted are having facilities for the secure storage of personal information, having secure offices and access controls for our computer systems.

We will also take reasonable steps to destroy or permanently de-identify personal information that we no longer need for any purpose for which may be used or disclosed under the National Privacy Principles.

Using and Disclosing Your Personal Information

We will not intentionally disclose your or your client's personal information to any other party unless you specifically request this or we are legally obliged.

Organisations outside Australia

Currently, we do not share your information with organisations outside Australia.

We may store your information in the cloud or other types of networked or electronic storage. As electronic or networked storage can be accessed from various countries via an internet connection, it's not always practicable to know in which country your information may be held. If your information is stored in this way, disclosures may occur in countries other than those listed. Overseas organisations may be required to disclose information we share with them under a foreign law. In those instances, we will not be responsible for that disclosure.

Accessing your Personal Information

You can gain access to your personal information that we hold. This is subject to exceptions allowed by law such as where providing you with access would have an unreasonable impact upon the privacy of others. If we deny a request for access we will provide you with the reasons for this decision. To request access please contact us (see “Contacting Us and Privacy Issues” below).

Correcting Your Personal Information

We endeavour to take reasonable steps to ensure that the personal information that we collect and use is accurate, complete and up-to-date. If you believe that any of the personal information that we hold is not accurate, complete or up-to-date please contact us (see “Contacting Us and Privacy Issues” below) and provide us with evidence that it is not accurate, complete and up-to-date.

If we agree that the personal information requires correcting we will take reasonable steps to do so. If we do not correct your personal information we will provide you with the reasons for not correcting your personal information. If you request that we associate with the information a statement claiming that the information is not accurate, complete and up-to-date we will take reasonable steps to comply with this request.

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 at admin@advicewrite.com.au