



Giles Wade Private Wealth Privacy Policy Statement

The National Privacy Principles

From 21 December 2001, most private sector organisations in Australia must, by law, comply with the National Privacy Principles ("NPPs"). We are bound by and will comply with the NPPs from that date.

Your privacy is important to Giles Wade Private Wealth

Your privacy is important to us. This statement outlines Giles Wade Private Wealth's policy on how we manage the personal information we hold about our customers, stakeholders and others.

It is our policy to respect the confidentiality of information and the privacy of individuals. GILES WADE is bound by the National Privacy Principles contained in the Commonwealth Privacy Act.

Giles Wade Private Wealth's Privacy Policy Statement will be reviewed from time to time to take account of 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 Privacy Policy Statement.

Why do we collect personal information?

Our business is to understand and meet our clients' needs over their lifetime for a wide range of financial and other services. To do this effectively, we need to collect certain personal information.

We only collect personal information that is necessary for us to perform our functions and activities, which consist of the preparation of income tax returns, provision of tax advice and strategic financial advice, and related activities.

What type of information do we collect?

The kinds of personal information we collect and hold will depend upon your dealings with us and the circumstances in which it was collected, but may include information you provide to us when you give us information relating to your personal tax return, or the provision of strategic advice.

This information will include your name, address and contact details, and, if applicable, identification information relevant to applications requiring compliance with the Financial Transactions Reports Act and the Anti Money Laundering Act.

How do we use this information and who may we disclose it to?

We respect your need for privacy.

Unless you are informed otherwise, the personal information we hold is used for the preparation of your tax returns and for the provision of strategic advice.

In delivering our service to you, it may be necessary to disclose your information to other individuals or organisations such as:

- professional advisers such as solicitors, banks and valuers;
- mortgage brokers;
- underwriters;
- government agencies such as those which administer land titles and revenue or investments;
- external organisations to establish structures; and
- other organisations which participate in financial services, we may also use your personal information to provide you with information about other products and services offered or distributed by us. To do that we may disclose your information to our service providers (see below).

We also disclose personal information to organisations to which we outsource functions, such as companies to establish structures, banks, solicitors if you require legal services, fund managers and other associated entities.

Sensitive information is subject to greater restrictions

Some personal information we hold is 'sensitive'.

Sensitive information includes a person's racial or ethnic origin, membership of political bodies, religions or trade unions, sexual preferences or activities, criminal record, state of health and medical history.

It is our policy that sensitive information will be used and disclosed only for the purposes for which it was provided, unless the client agrees otherwise or the use or disclosure of this information is allowed by law.

How do we store personal information?

Safeguarding the privacy of your information is important to us, whether you interact with us personally, by phone, mail, over the internet or other electronic medium. We hold personal information in a combination of secure computer storage facilities and paper-based files and other records, and take steps to protect the personal information we hold from misuse, loss, unauthorised access, modification or disclosure.

We may need to maintain records for a significant period of time. However, when we consider information is no longer needed, we will remove any details that will identify you or we will securely destroy the records.

How do we keep personal information accurate and up-to-date?

Giles Wade Private Wealth endeavours to ensure that the personal information it holds is accurate and up-to-date. We realise that this information changes frequently with changes of address and other personal circumstances.

Access to your personal information

Under the Commonwealth Privacy Act, you have the right to obtain a copy of any personal information which we hold about you and to advise us of any perceived inaccuracy. The Act does set out some exceptions to this.

To make a request, please contact us at the details provided below.

Complaints

If you consider that any action of ours breaches this Privacy Policy Statement or the National Privacy Principles, or otherwise doesn't respect your privacy, you can make a complaint. This will be acted upon promptly.

To make a complaint, please contact us at the details provided below.

How to contact us

If you want to make a general enquiry about Giles Wade Private Wealth's privacy policy, change your personal information, access your personal information or make a complaint, please contact us on the details provided below:

Giles Wade Private Wealth Pty Ltd
Level 2, 90 William Street
MELBOURNE VIC 3000
Ph. 03 9670 6070