

## Privacy Policy

The privacy of our clients and their personal information is an important issue for InterPrac Financial Planning. All information is collected, held and used by us in the strictest confidence and pursuant to the InterPrac Privacy Policy. The following policy outlines how InterPrac complies with the Australian Privacy Principles, and how we collect, use, disclose and manage personal information.

### Confirming your identity

In accordance with the Anti-Money Laundering and Counter-Terrorism Financing Act 2006, InterPrac Financial Planning are required by law to collect and maintain identification documents such as Drivers' Licences and Passports that allow us to satisfactorily confirm your identity.

### Collection of Information

- InterPrac Financial Planning collects and holds your personal information for the sole purpose of providing financial services to you, and discharging our legal obligations.
- If the information you provide to us is inaccurate or incomplete, it may impact the quality and appropriateness of our recommendations.
- Where we are arranging insurance and/or investment products for you, we will be required to collect and lodge relevant information for the purposes of those applications.
- Where you provide us with information about another person, such as your nominated beneficiary, you must ensure that they are aware information has been provided to us and of the existence of this document.

### Use and Disclosure

We will only use or disclose your personal information in the following circumstances:

- For the purpose of providing you with financial services, or in arranging for the application of insurance or investments on your behalf;
- Where you provide your consent, either expressly or implied by your behaviour, for information to be provided to a third party (eg your accountant);
- Where we are required by law;
- Where we are using the information in a direct marketing communication (you will have the option of electing not to receive direct marketing materials).

### Quality of Information

We will make every effort to ensure that the personal information we collect is accurate, complete and up-to-date, however we will rely on you informing us if your personal details change.

### Security of Information

We will take reasonable steps to protect the personal information we hold from misuse, loss, and from unauthorised access, modification or disclosure. Where your personal information is no longer needed, and we are not required by law to maintain it, we will ensure that it is securely and permanently destroyed.

### **Access to Personal Information**

You may at any time request access to your personal information from the past 7 years, that we hold.

We will endeavour to comply with your request as soon as possible, which would normally be within a period of 14 days. In most cases there will be no charge for providing such information, however, requests involving large amounts of information may incur a handling fee.

### **Contacting InterPrac Financial Planning**

If you have a complaint in regards to the collection or use of your personal information, or have an enquiry about this Privacy policy, please write to:

**Privacy Officer**  
**InterPrac Financial Planning Pty Ltd**  
Level 8, 525 Flinders Street  
Melbourne Vic 3000  
Phone: (03) 9209 9777  
Email: [planning@interprac.com.au](mailto:planning@interprac.com.au)