

PRIVACY COLLECTION STATEMENT

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This Privacy Collection Statement forms part of our Privacy Policy. Together they are our notice to you about the collection of personal information under Australian Privacy Principle 5.

Why we collect your information

We collect and verify personal information about you (and, where applicable, persons acting on your behalf) so that we can provide financial advice and services that are appropriate to your needs, review your existing superannuation, insurance and investments, manage our relationship with you, and meet our legal obligations.

How we collect it

We collect information directly from you, including through our online forms. With your authority, we also collect information about you from third parties such as your superannuation funds, insurers, investment platforms and other product issuers (including through data feeds to our systems), property data providers, your accountant and other professional advisers, your employer and, where you have separately consented, medical practitioners. If you sign an authority to access information, the product providers you list will release information about your policies and accounts to us.

Laws that require us to collect information

We are required or authorised to collect certain information under the Corporations Act 2001 (Cth), the Anti-Money Laundering and Counter-Terrorism Financing Act 2006 (Cth), and taxation and superannuation law. This includes information we need to know our clients, to verify your identity and to act in your best interests when we give advice.

If you do not provide information

The information we need depends on who you are and the services you ask us to provide. If you do not provide the information we ask for, or it is incomplete or inaccurate, we may not be able to provide the products or services you are seeking, or not within the expected time. Our advice may be less appropriate to your circumstances as a result. In some cases we may be unable to continue acting for you.

Health information

We only collect health information with your separate consent, and only for the purpose of obtaining, reviewing, replacing or claiming on insurance.

Who we disclose it to

We may disclose your personal information to our authorised representatives and staff, superannuation trustees, insurers and other product and platform providers, medical practitioners (for insurance purposes), your accountant and other people you authorise, businesses that referred you to us, our service providers (including administration, paraplanning, information technology, online form, electronic signature and identity verification providers), our auditors and professional advisers, and regulators and dispute resolution bodies. We also disclose personal information where you consent or where the law requires or authorises it. A full list is set out in our Privacy Policy.

Overseas disclosure

Some of our staff, contractors and service providers are located, or have operations, outside Australia. Your personal information may be stored, accessed or processed in other countries, including New Zealand, Sri Lanka, Singapore, the United Kingdom, the Philippines, India and the United States of America. These countries may change from time to time and you can contact us for current details. We take reasonable steps to ensure overseas recipients do not breach the Australian Privacy Principles. If you do not want your information handled outside Australia, please contact us.

Access, correction and complaints

Our Privacy Policy explains how you can access and correct your personal information, how you can complain about a breach of the Australian Privacy Principles, and how we will deal with your complaint. It is available at www.expertwealth.com.au or by contacting us using the details above.