

Our Privacy Policy

We will treat any personal information you provide to us with all due care and respect your right to privacy. We collect personal information from our clients primarily to ensure that their investments are implemented and maintained efficiently. This information also enables us to notify our clients of opportunities we feel are most appropriate to their needs and situation. Hence, we tend to collect details of each client's name, address, age and other contact details and identifying factors. But our primary purpose in doing so is to provide those clients with an efficient level of service.

We will not collect any personal information about you except when you have knowingly provided that information to us or authorised a third party to provide that information to us. We will only collect, maintain and use Personal Information about you if it is necessary for us to adequately provide to you the services you have requested. We will not use or disclose personal information collected by us for any purpose other than:

- the purposes for which it was provided or secondary related purposes in circumstances where you would reasonably expect such use or disclosure; or
- where you have consented to such disclosure; or
- where the National Privacy Principles authorise use or disclosure.

Your personal information is generally held in your client file. Information may also be held in a computer database. We will at all times seek to ensure that the personal information collected and held by us is protected from misuse, loss, unauthorised access, modification or disclosure. You may at any time, by contacting us by any of the methods detailed below, request access to your personal information and we will (subject to the following exceptions) provide you with access to that information either by providing you with copies of the information requested, allowing you to inspect the information requested, or providing you with an accurate summary of the information held. We will, prior to providing access in accordance with this policy, require you to provide evidence of your identity.

We will endeavour to ensure that, at all times, the personal information about you that we hold is up to date and accurate. In the event that you become aware, or believe, that any personal information that we hold about you is inaccurate, incomplete or outdated, you may contact us and provide to us evidence of the inaccurate, incomplete or outdated information and we will, if we agree that the information requires correcting, take all reasonable steps to correct the information. If we do not agree that your personal information requires correcting, we must, if you request, take reasonable steps to ensure that whenever your personal information is accessed or handled in the future, it is apparent that you are not satisfied as to the accuracy or completeness of that information.

If you wish to complain about any breach or potential breach of this privacy policy or the National Privacy Principles, you should contact us by any of the methods detailed below and request that your complaint be directed to the Privacy Officer. Your complaint will be considered within 7 days and responded to. It is our intention to use our best endeavours to resolve any complaint to your satisfaction, however, if you are unhappy with our response, you are entitled to contact the Office of the Privacy Commissioner who may investigate your complaint further.

While it is not necessary to register your personal details to use our website, we do offer a registration service that will enable you to receive product and service updates, newsletters and other information. In the event you do register with us, we will collect personal information from you, including your name and e-mail address. If you have registered with us and decide, at any time, that you do not wish to receive any further information from us, you can send an e-mail to the e-mail address noted below requesting to be removed from our online registration database. Please allow 2 weeks for your request to be actioned.

Our Website may use cookies that allow us to identify your browser while you are using our site. Cookies do not identify you, they simply allow us to track usage patterns so that we can measure the level of interest in various areas of our site. All browsers allow you to be notified when you receive a cookie and elect to either accept it or not. Your internet service provider should be able to assist you to set your preferences. Our website (www.managed.com.au) contains links to other websites whose operator may or may not adhere to a privacy policy or be governed by the National Privacy Principles. If you have any questions regarding our privacy policy or believe we are in breach, please do not hesitate to speak to our Privacy Officer Michael Lorimer.