



# INTAS FINANCIAL SERVICES PTY LTD

## PRIVACY POLICY

At Intas Financial Services Pty Ltd, we are committed to protecting your privacy in accordance with the Privacy Act 1998 (Cth). This Privacy Policy describes our current policies and practices in relation to the handling and use of personal information.

We must collect personal information and, in circumstances, sensitive information such as information about your health, in order to provide financial advice and to process your investment decisions efficiently. We normally collect personal information directly from you but if you have consented, or would reasonably expect us to, we may collect personal information from a third party as well.

The information has been and will continue to be, collected by us pursuant to Financial Services Law, for the purpose of providing you with financial services including:

- preparation of your financial plan;
- making securities and investment recommendations;
- making personal insurance recommendations;
- provision of financial planning advice to you; or
- reviewing your financial plan, personal insurance, securities and investment recommendations.

All the information provided will be held in the strictest confidence. We do not give information about you to anyone else unless one of the following applies:

- it is necessary in order to provide you with the financial services you expect us to, or we have told you we will;
- you have consented; or
- it is required or authorised by law.

If you do not consent to such disclosure, we will not be able to provide you with financial services. The types of organisations to whom we typically disclose your personal information includes mailing houses, information technology staff (for the purpose of maintenance of our IT systems) and related service providers, superannuation trustees, product issuers including

insurance companies as well organisations undertaking compliance reviews of our representatives or other due diligence undertaken on us or our representatives.

Should you wish to authorise the disclosure of your personal information to other parties, please notify us in writing.

The Company may use personal information collected from you to advise you about other financial products and services, or survey your opinions on products or services. You may elect not to receive such information by contacting your representative or writing to the company's privacy officer, in which case, we will record that you do not want direct marketing material.

A copy of the Privacy Policy is on the Company's website and we refer to this Policy in our Financial Services Guide.

If you choose to not provide identity information and personal information, or information that is incomplete or inaccurate, it may:

- mean that we cannot provide you with financial services;
- result in the provision of a financial service that is not appropriate to your circumstances, needs and objectives; or
- result in you paying more tax than may otherwise apply.

### **Security of personal information**

We endeavour to protect any personal information that we hold from misuse and loss and to protect it from unauthorized access, modification and disclosure. For example, we maintain physical security over our paper and electronic data stores and premises, such as paper shredders, file locks and security systems. We also maintain computer and network security; for example we use firewalls (security measures for the Internet) and other security systems such as user identifiers and passwords to control access to computer systems.

### **Access**

You may request access to the personal information that we hold about you and ask us to correct personal information we hold. We reserve the right to charge a fee for supplying the information and in some circumstances, may deny access to the extent that we are required to comply with the Privacy Act, in which case we will provide you with the reason for the denial of access to your personal information.

## **How to contact us**

If an individual wishes to gain access to their personal information, wishes for us to correct or update it, or have a complaint about a breach of their privacy (or any other query relating to our Privacy Policy), they can contact our Privacy Officer during business hours on:

Telephone: 03 6334 6922  
Facsimile: 03 6334 7860  
Email: [enquiries@intasgroup.com.au](mailto:enquiries@intasgroup.com.au)  
Mail: PO Box 27, Launceston Tas 7250.

For more complex queries we will require the request from the individual in writing and there may be a charge for same depending on the effort. We will respond to an individual's query or complaint as soon as possible and will try to resolve any complaint within 14 working days. If this is not possible, we will contact the individual within that time to let them know how long we estimate that it will take to resolve the complaint. Any unresolved complaints should be referred to the Privacy Commission.