

EDGEWORTH PARTNERS PRIVACY POLICY

Edgeworth Partners Pty Ltd abides by the National Privacy Principles established under the Privacy Amendment (Private Sector) Act 2001. A summary of the National Privacy Principles can be obtained by contacting our office or can be viewed at the following the Office of the Federal Privacy Commissioner web site: <http://www.privacy.gov.au/publications/npps01.html>

As a business administration support organisation, we are often in contact with or required to obtain and hold detailed information that personally identifies you and or your business, and/or contains information or an opinion about you and/or your business, which we refer to as personal and business information. In addition, our ability to provide you and/or your nominated advisers with a comprehensive business needs analysis and on-going service, might be dependent on us obtaining certain personal and business information about you, including:

- Employment details and employment history for yourself and others within the business
- Sometimes financial needs and objectives
- Details of your current financial circumstances, including your assets and liabilities (both actual and potential), income, expenditure, insurance cover, investments and superannuation
- Details of your health for insurance and superannuation purposes
- Information about your employment history, employment circumstances, family commitments and social security eligibility

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.

Generally, collection of your personal information will be effected in either face to face interviews, over the telephone or by way of an online client engagement form. From time to time, additional and/or updated personal information may be collected through one or more of those methods.

We will only collect, maintain and use personal information about you, if it is necessary for us to adequately provide to you or your nominated advisers, the services you have requested as per a business needs analysis and/or our scope of works.

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 where required or authorised under law, in circumstances relating to public health and safety and in connection with certain operations by or on behalf of an enforcement body.

We may use the personal and business information collected from you for the purpose of providing you with direct marketing material such as articles that may be of interest to you, however you may, by contacting us by any of the methods detailed below, request not to receive such information and we will give effect to that request.

As previously stated, we may disclose your personal and/or business information to your accountant and/or tax agent superannuation fund trustees, insurance providers, and product issuers that you have engaged and as advise by you.

In the event that we propose to sell our business we may disclose your personal and business information to potential purchasers for the purpose of them conducting due diligence investigations. Any such disclosure will be made in confidence and it will be a condition of that disclosure that no personal or business information will be used or disclosed by them. In the event that a sale of our business is effected, we may transfer your personal and business information to the purchaser of the business. As a client you will be advised of any such transfer.

Your personal and business 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 and business information collected and held by us is protected from misuse, loss, unauthorised access, modification or disclosure. At all times your personal and business information is treated as confidential and any sensitive information is treated as highly confidential. All paper files are stored in lockable office, which is locked outside of normal business hours. All computer-based information is protected through the use of access passwords on each computer. Data is backed up regularly and stored securely off site.

In the event you cease to be a client of this organisation, any personal and business information may be destroyed.

You may at any time, by contacting us by any of the methods detailed below, request access to your personal and business 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 not provide you access to personal and business information which would reveal any confidential formulae or the detail of any in house evaluative decision making process, but may instead provide you with the result of the formulae or process or an explanation of that result.

We will not provide you with access to your personal information if:

- Providing access would pose a serious threat to the life or health of a person;
- Providing access would have an unreasonable impact on the privacy of others;
- The request for access is frivolous or vexatious;
- The information related to existing or anticipated legal proceedings between us and would not be discoverable in those proceedings;
- Providing access would reveal our intentions in relation to negotiations with you in such a way as to prejudice those negotiations;
- Providing access would be unlawful;
- Denying access is required or authorised by or under law;
- Providing access would be likely to prejudice certain operations by or on behalf of an enforcement body or an enforcement body requests that access not be provided on the grounds of national security.

In the event we refuse you access to your personal information, we will provide you with an explanation for that refusal.

We will endeavour to ensure that, at all times, the personal and business information we hold about you, is up to date and accurate. In the event that you become aware, or believe, that any personal and/or business information, which we hold about you is inaccurate, incomplete or outdated, you may contact us and we will take all reasonable steps to correct the 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 as soon as possible 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.

The Edgeworth Partners web site contains links to other web sites whose operator may or may not adhere to a privacy policy or be governed by the National Privacy Principles.

Our web site may utilise cookies, which 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.

If you would like more information about how we manage your personal information, or if you have any questions, please contact us on (02) 9476 6700, or write to us at the address set out below.

The Privacy Officer
Edgeworth Partners Pty Ltd
PO Box 875
HORNSBY NSW 1630