

# CORP-PLAN CONSULTANTS PTY LTD

ABN: 24 087 157 579

## PERSONAL INFORMATION COLLECTION STATEMENT

*Privacy Act 1988 (Cth)*

### PLEASE READ THIS NOTIFICATION CAREFULLY

#### Introduction

The *Privacy Act 1988* (“Privacy Laws”) regulates the handling of personal information about individuals and sets out various Australian Privacy Principles (“APPs”) concerning the protection of the privacy of individuals and provide various standards, rights and obligations in relation to handling, holding, accessing and correcting personal information.

Corp-Plan Consultants Pty Ltd and Corp-Plan Wealth Management Pty Ltd (“Corp-Plan”, “We”) wish to collect personal information from you and are required to comply with the APPs by communicating to you that we collect personal information, from where we collect it and the purpose for which we collect it in relation to the use of our website at [www.corpplanaccountants.com.au](http://www.corpplanaccountants.com.au) (the “Website”) or your use of our services (collectively “our Business”).

This statement sets out how Corp-Plan handles the disclosure and handling of your personal information and for what purposes you consent to the use of the personal information.

#### 1. MANAGEMENT OF PERSONAL INFORMATION IN RELATION TO THE BUSINESS

- (1) We will only use personal information provided by you for the purposes for which it was collected and we will not disclose your personal information to a third party. This does not include trusted third parties such as consultants who assist us in operating or conducting our Business or servicing you so long as those parties agree to keep this information confidential.
- (2) These obligations apply to your personal information which is collected by us or disclosed to us as result of our Business. Your Business with us and your use of the Website is also governed by our Terms and Conditions. You agree that by using this Website or using our services you accept this Privacy Statement and our Terms and Conditions.
- (3) We may amend or update this Privacy Statement from time to time. Any changes will be effective from the date of publication on our Website (which you should check when you use it) or other notice to you.

#### 2. MEANING OF “PERSONAL INFORMATION”

Personal information means information we hold about you from which we can determine your identity or where your identity can be reasonably established.

### **3. TYPES OF PERSONAL INFORMATION COLLECTED**

The type of personal information we collect from you generally comprises your name, address (home, business and email), Internet Protocol (IP) address, contact details (telephone, mobile, facsimile) and financial information which is relevant to the services you require from us.

### **4. USE AND DISCLOSURE OF PERSONAL INFORMATION**

(1) We may use or disclose your personal information for the purpose for which it was collected including where you would reasonably expect us to use or disclose your personal information.

(2) In addition, we are permitted to use or disclose personal information held about you:

- where you have consented to the use or disclosure;
- where we reasonably believe that the use or disclosure is necessary to lessen or prevent a serious, immediate threat to someone's health or safety or the public's health or safety;
- where we reasonably suspect that unlawful activity has been, is being or may be engaged in and the use or disclosure is a necessary part of our investigation or in reporting the matter to the relevant authorities;
- where such use or disclosure is required under or authorised by law. For example, to comply with a subpoena, a warrant or other order of a court or legal process;
- where we reasonably believe that the use or disclosure is necessary for prevention, investigation, prosecution and punishment of crimes or wrongdoings or the preparation for, conduct of, proceedings before any court or tribunal or the implementation of the orders of a court or tribunal by or on behalf of an enforcement body.

(3) We will at all times take reasonable steps to ensure that you are made aware of who we are, the fact that you are able to gain access to the information held about you, the purpose of the collection, the type of organisation(s) to which we usually disclose the information collected about you, any laws requiring the collection of the information and the main consequences for you if all or part of the information is not collected at or before the time the personal information is collected.

### **5. PURPOSES FOR WHICH PERSONAL INFORMATION IS COLLECTED**

(1) We collect personal information should you wish to use our services or should you contact us, for example, by subscribing to our Website mailing list or asking for information or advice.

(2) We only collect personal information when necessary to conduct our Business activities.

(3) Any financial information collected through our Website is used for the sole purpose of completing the provision of our services. Without this information, we would be unable to achieve the purpose for which the information was given to us. The financial information we collect from you is strictly confidential and held on secure servers in controlled facilities.

(4) We do not disclose information to overseas recipients unless you have consented.

(5) We collect information in the following ways:

- when you contact us, we will keep a record of that correspondence;
- when conducting certain types of transactions with us;
- when submitting your details to our website mailing list;
- if we require you to provide us with contact information including your name, address, telephone numbers, email address and financial information such as credit card details

## **6. CONSEQUENCES OF WITHHOLDING PERSONAL INFORMATION**

Without this personal information, we would not be able to carry on our Business and provide services to you. You understand that the implications of withholding your consent mean that we will be unable to act for you in any matter.

## **7. LINKS**

The Website may contain links to other websites. We are not responsible for the privacy practices of other websites and you access destination links at your own risk.

## **8. FUTURE CONTACT AND YOUR PRIVACY**

We may use the personal information we collect from you to contact you and provide you with updated information about the Website or to provide you with other information about our services. If you do not wish to receive such information, please notify us at the contact details below.

## **9. ACCESS AND SEEKING CORRECTION OF YOUR PERSONAL INFORMATION**

We take reasonable steps to ensure the personal information we collect is accurate, up to date and complete. If you require access to your personal information, please contact us. To ensure confidentiality, your personal information will only be disclosed to you if we are satisfied that the information relates to you. For this reason, we reserve the right to deny access to or correct your personal information.

## **10. DATA SECURITY**

(1) We have taken reasonable steps to ensure the security of your personal information. We employ appropriate technical, administrative and physical procedures to protect personal information from misuse, interference and loss, unauthorised disclosure or alteration. The financial information we collect from you is strictly confidential and held on secure servers in controlled facilities.

(2) However, you transmit information to us at your own risk as no information transmitted over the Internet can be guaranteed to be 100% secure. We cannot accept responsibility for misuse or loss of, or unauthorised access to, personal information where the security of information is not within our control. You are solely responsible for keeping any passwords and/or account information private.

## **11. WEBSITE PRIVACY**

When you visit the Website or download information from it, our Internet Service Provider (ISP) makes a record of your visit and records the following information:

- your Internet Address;
- your domain name (if applicable);
- the date and time of your visit to the website;
- previous site visited; and
- browser type.

This information is anonymous and does not identify individual users. You can also configure your Internet browser to accept all cookies, reject all cookies or notify you when a cookie is sent.

## **12. COMPLAINTS**

You can make a complaint if you believe that we have breached your privacy. Please direct your complaint to Corp-Plan. Complaints will be reviewed by us and a response will be provided within 30 days of receipt of the complaint by us.

If you require further information regarding our Privacy Policy, please contact us on (07) 5574 0501 or through the contact form on our website. Should you wish to read more information on privacy legislation or the National Privacy Principles, you may visit the Office of the Australian Information Commissioner at <http://www.oaic.gov.au/>.

*Privacy Statement last updated 31 July 2016.*