



Financial Planners

## PRIVACY STATEMENT

At Price Williams Whyte we are committed to protecting your privacy in accordance with the Privacy Act 1998 (Cth). This document describes our current policies and practices in relation to the handling and use of personal information.

### What information do we collect and how do we use it?

When we advise you about your financial affairs, we ask you for the information we need to understand your financial situation, needs and objectives. We provide any information that the fund managers, financial institutions or insurers whom we deal with on your behalf need to implement your investment and insurance strategies.

We also use your information to send you requested product information and promotional material and to enable us to manage your ongoing requirements; eg., Further investments or insurances, our relationship with you; eg, invoicing, client surveys etc.

We may occasionally notify you about new services and special offers, events or articles we think will be of interest to you. We may send you regular updates by email or by post on investment and insurance matters. If you would rather not receive this information, email or write to us.

We may use your information internally to help us improve our services and help resolve any problems.

### What if you don't provide some information to us?

We can only fully advise you if we have all relevant information.

### How do we hold and protect your information?

We strive to maintain the reliability, accuracy, completeness and currency of the personal information we hold and to protect its privacy and security. We keep personal information for as long as is necessary for the purpose for which it was collected or to comply with any applicable legal or ethical reporting or document retention requirements.

We hold the information we collect from you within our client administration programmes provided by Xplan or Class Super, these are Third Party database cloud Platforms.

Also much of the information we hold about you is stored within paper files which are placed within fire proof cabinets after being scanned into our computers. Our offices can only be entered by the use of a password punched into a keypad or a swipe key issued to authorised persons so at all times unauthorised people are attended by a staff person.

A Suite 20, Cooks Hill Health Hub, 235 Darby Street, Newcastle NSW 2300 P PO Box 219, The Junction NSW 2291  
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Our Server is backed up daily and stored electronically in secure data centres which are located in Australia and owned by external Service Providers.

Employees are trained in and bound by our internal information security policy and are required to keep information secure and private.

Access to our information systems is controlled by identity and access management.

All emails are stored within Microsoft 365 in the Cloud managed by Telstra.

**Will we disclose the information we collect to anyone?**

We do not sell, trade, or rent your personal information to others.

We may need to provide your information to contractors who supply services to us; eg., to handle mailings on our behalf or to other companies in the event of a corporate sale, merger, reorganisation, dissolution or similar event. However, we will do our best to ensure that they protect your information in the same way that we do.

A Third Party IT Service Provider has secure remote access to our Server for the purposes of efficient ongoing computer servicing and management of our Data Protection and Security.

We provide secure access to information held within Xplan and the Class Super Administration Platforms and to Service Providers within the Philippines.

Drop Box is used in some circumstances as a secure way of collecting your personal data and sharing our Reports with you when reviewing.

We may provide your information to others if we are required to do so by law or under some unusual other circumstances which the Privacy Act permits.

**How can you check, update or change the information we are holding?**

Upon receipt of your written request and enough information to allow us to identify the information, we will disclose to you the personal information we hold about you. We will also correct, amend or delete any personal information that we agree is inaccurate.

If you wish to access or correct your personal information please write to Price Williams Whyte, PO Box 219 The Junction NSW 2291 or email [rw@pww.com.au](mailto:rw@pww.com.au).

We do not charge for receiving a request for access to personal information or for complying with a correction request.

**Your consent**

By asking us to assist with your investment and insurance needs, you consent to the collection and use of the information you have provided to us for the purposes described above.

**Tell us what you think?**

We welcome your question and comments about privacy. If you have any concerns or complaints, please contact Rose Williams, General Manager, Price Williams Whyte, PO Box 219 The Junction NSW 2291, 49265000 or [rw@pww.com.au](mailto:rw@pww.com.au)

