



## Privacy Policy

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## Respecting your privacy

At ProInvest the privacy of your personal information is important to us. Our Privacy Policy is designed to provide you with general information about how we collect, store, use and disclose your personal information. We will collect, use and disclose your personal information in accordance with the Australian Privacy Principles in the Privacy Act 1998 (Cth) (Act) and this Privacy Policy.

## Collecting your personal information

ProInvest gathers information from you in the course of our business commitment to you to provide you with advice suitable to meet your requirements. We store the information provided by you onto our onsite software system, directly to us at meetings, telephone conversations, emails from you and in any other relevant format.

You may provide basic information to allow us to send information, provide updates etc. We may collect additional information at other times, including but not limited to when you provide information about your personal or business affairs, when you provide authority for us to contact third parties such as insurance companies. The type of information we may be collecting includes:

The information provided by you allows us to give you the best practice advice, which can be reliant on additional information request at various times, including but not limited to information provided by you on your personal and business affairs, facilitated by your authority to contact third parties such as Insurance Companies and Accounting Practices.

- Name/s
- Date of birth
- Phone numbers
- Residential & postal address
- Email address
- Assets & liabilities
- Employment information including income
- Health status
- Investment, Superannuation and insurance policy details

## Use of your personal information

ProInvest may use personal information collected from you to provide you with information, updates and our services. We may also make you aware of new and additional products, services and opportunities available to you. We may use your personal information to improve our services and better understand your needs.

Understanding and meeting our clients' financial needs over the course of their lifetime is a central part of our business. Any personal information collected by ProInvest is solely for the purpose of providing services to you and is not disclosed unless the disclosure is required in the performance of those services (for example, disclosing your information to a financial institution in order to place an investment on your behalf or providing information to an insurance provider to implement personal insurance cover).

ProInvest may contact you by a variety of measures including, but not limited to telephone, email, sms or mail.

## Disclosure of personal information

We may disclose your personal information to any of our employees, officers, insurers, professional advisers, agents, suppliers or subcontractors insofar as reasonably necessary for the purposes set out in this Policy. Personal information is only supplied to a third party when it is required for the delivery of our services.

We may from time to time, need to disclose personal information to comply with a legal requirement, such as a law, regulation, court order, subpoena, warrant, in the course of a legal proceeding or in response to a law enforcement agency request.

We may also use your personal information to protect the copyright, trademarks, legal rights, property or safety of ProInvest, [www.ProInvest.com.au](http://www.ProInvest.com.au), its customers or third parties.

By providing us with personal information, you consent to the terms of this Privacy Policy and the types of disclosure covered by this Policy. Where we disclose your personal information to third parties, we will request that the third party follow this Policy regarding handling your personal information.

## Security of your personal information

ProInvest is committed to ensuring that the information you provide to us is secure. In order to prevent unauthorised access or disclosure, we have put in place suitable physical, electronic and managerial procedures to safeguard and secure information and protect it from misuse, interference, loss and unauthorised access, modification and disclosure.

We are a paperless office, with your personal information saved on our financial planning software that has its own security and safety measures. Data is encrypted and all users have their own login details with individual passwords. All movements in the system are date and time stamped by the individual user so any unauthorised access, change or misuse of information can be identified immediately.

The transmission and exchange of information is carried out at your own risk. We cannot guarantee the security of any information that you transmit to us, or receive from us. Although we take measures to safeguard against unauthorised disclosures of information, we cannot assure you that personal information that we collect will not be disclosed in a manner that is inconsistent with this Privacy Policy.

## Access to your personal information

You may request details of personal information that we hold about you in accordance with the provisions of the Privacy Act 1988 (Cth). A small administrative fee may be payable for the provision of information. If you would like a copy of the information which we hold about you or believe that any information we hold on you is inaccurate, out of date, incomplete, irrelevant or misleading, please email us at [info@ProInvest.com.au](mailto:info@ProInvest.com.au) or to your appointed Adviser your adviser. If you find that any information is incorrect, please inform our office immediately as this may change the recommendations being made for your personal situation.

We reserve the right to refuse to provide you with information that we hold about you, in certain circumstances set out in the Privacy Act.

## Complaints about privacy

If you have any complaints about our privacy practices, please feel free to send in details of your complaint. We take complaints very seriously and will respond shortly after receiving written notice of your complaint.

Attention: Liz Athanasiadis  
Shop 2, 245 Bridge Road  
Richmond, Victoria 3121  
Email: [info@ProInvest.com.au](mailto:info@ProInvest.com.au)  
Phone: 03 9428 0041

It is our intention to use our best endeavours to resolve any complaint to your satisfaction; however, if you are still unhappy with our response, they you are entitled to contact the Office of the Australian Information Commissioner, who may investigate the complaint further.



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