

Privacy Policy



About this Privacy Policy

We are committed to protecting your privacy in accordance with the *Privacy Act 1988* (Cth).

This Policy describes our current policies and practices in relation to the collection, handling, use and disclosure of personal information. It also deals with how you can complain about a breach of the privacy laws, how you can access the personal information we hold about you and how to have that information corrected.

This Privacy Policy is authorised for distribution by Richmond Wealth Pty Ltd.

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

If you are acquiring or have acquired a service from Richmond Wealth Pty Ltd, we collect and hold your personal information for the purpose of providing you with relevant and accurate service and financial advice as well as managing and administering the service. This can include a broad range of information ranging from your name, postal and email address, date of birth, contact details and age to other information about your personal affairs including your financial details, tax file numbers or other information the organisation considers necessary.

We may disclose the information that you provide to third party organisations where you have request that we liaise with or refer you to the organisations. This may include firms providing accounting, legal, credit, transactional banking, investment administration or insurance services.

We may use your information to enable us to manage your ongoing requirements and our relationship with you. We may do so by mail or electronically unless you tell us that you do not wish to receive electronic communications.

From time to time we may use your contact details to send you offers, updates, events, articles, newsletters or other information about services or events that we believe will be of interest to you. You can contact us at any time if you no longer wish us to do so.

We may also 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?

If you do not provide us with some or all of the information that we ask for, we may not be able to accurately assess your situation and provide relevant and accurate financial advice.

How do we hold and protect your information?

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

We store information collected from you in different ways, including in paper and electronic form. The security of your personal information is important to us and we take reasonable steps to protect it from misuse and loss and unauthorised access, modification or disclosure.

Some of the ways we ensure that your information is safe are:

- confidentiality requirements for our employees
- security measures for systems access
- access control for our building

We also maintain physical security over our paper and electronic data and premises, by using locks and security systems.

Will we disclose the information we collect to anyone?

We do not sell, trade, or rent your personal information to others. We may disclose your information to third party organisations where you have requested that we liaise with or refer you to the organisations.

This may include firms providing investment, superannuation, accounting legal, credit, transactional banking or insurance services and may need to provide your information to contractors who supply services to us or to other companies in the event of a corporate sale, merger, reorganisation, dissolution or similar event.

However, we will take all reasonable steps to ensure that they protect your information in the same way that we do.

We may also 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.

We will not provide your information to any overseas recipients unless we are required to by Law.

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, irrelevant, out of date or incomplete.

If you wish to access or correct your personal information please contact our office (see contact details below). We do not charge for receiving a request for access to personal information or for complying with a correction request.

In some limited cases, we may need to refuse access to your information or refuse a request for correction. We will advise you as soon as possible after your request if this is the case and the reasons for our refusal.

What happens if you want to complain?

If you have any concerns about whether we have complied with the Privacy Act or this Privacy Policy when collecting or handling your personal information, you can call us on 08 6323 3131 or email your concerns to admin@richmondwealth.com.au.

We will consider any privacy related complaint through our internal complaints resolution process and we will try to respond with a decision within 45 days of you making the complaint.

Your consent

By asking us to assist with your financial 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 questions and comments about privacy. If you have any concerns or complaints, please contact us on 08 6323 3131 or via email on admin@richmondwealth.com.au.