



PFG & Partners Pty Ltd ATF The PFG Unit Trust

PRIVACY STATEMENT

PFG Group of Companies seeks to provide the best possible service to its customers by providing the best possible range of services. We understand how important it is to protect your personal information. This document sets out our Privacy Policy commitment in respect to personal information that you may provide to us. We recognize that any personal information we collect about you will only be used for the purposes indicated in our policy. It is important to us that you are confident that any personal information we collect from you or is received by us will be treated with appropriate respect ensuring protection of your personal information. Our commitment in respect of personal information is to abide by the National Privacy Principles for the protection of personal information, as set out in the Privacy Act 1988 and any other relevant law.

PERSONAL INFORMATION

When we refer to **personal information** we mean information from which your identity is apparent. This information may include [but not limited to] information or an opinion about you, from which your identity can reasonably be ascertained. Where reasonable and practical we will collect your personal information only directly from you.

WHY WE COLLECT YOUR PERSONAL INFORMATION

We collect and receive personal information from our customers or from other business referrers in order to conduct our business. From time to time we may offer other products and services. To enable us to maintain a successful business relationship with you, we may disclose your personal information [with your approval] with other organisations that provide complimentary products and services used or marketed by us. We may also disclose your personal information to any organisation that may have or is considering having an interest in our business.



TO WHOM WILL WE DISCLOSE YOUR PERSONAL INFORMATION?

Where possible we will inform you, at or before the time of collecting your personal information, the types of organisations that we intend to disclose your personal information to. Prior to disclosing any of your personal information to any other organization we will take all reasonable steps to satisfy ourselves that:

- (a) The organization has a commitment to protecting your personal information at least equal to our commitment; and
- (b) You have consented to us doing so

Sometimes we are required or authorized by law to disclose your personal information. Circumstances in which we may disclose your personal information would be to a Court or Tribunal in response to a request or in response to a subpoena or to the Australian Taxation Office.

ACCESS TO YOUR PERSONAL INFORMATION

We will provide you with access to the personal information we hold about you. You may request access to any of the personal information we hold about you at any time. To access personal information we hold about you, use the contact details specified in our Contact Us page. We may charge a fee for any costs incurred in retrieving and supplying information to you. There may be situations where we are not required to provide you with access to your personal information. For example, such a situation would be information relating to an existing or anticipated legal proceeding with you, or if your request is vexatious. An explanation will be provided to you, if we deny you access to your personal information that we hold. Where sensitive information is collected, stored, used or transferred about you, we will only use this information if you have consented or in the exercise or defense of a legal claim. Sensitive information is information relating to your racial or ethnic origin, political persuasion, memberships in trade or professional associations or trade unions, sexual preferences, criminal record or health issues.

HOW SAFE IS YOUR PERSONAL INFORMATION WE HOLD?

We will take all reasonable steps to protect your personal information by storing it in a secure environment. When the information is no longer needed for any purpose the information will be permanently de-identified from misuse, loss and unauthorized access, modification or disclosure. You may request further information about the way we manage your personal information by writing or emailing.

Privacy Act 1988 Consent

To allow us to proceed and assist you in your objective, if we require personal information, you will be invited to sign an acknowledgement that gives us the authority to use your information.