

Privacy policy

General

Ingwersen & Lansdown Securities Limited (referred to in this document as **we, us or our**) recognises that your privacy is very important and we are committed to protecting the personal information we collect from you. The *Privacy Act 1988* (Cth) (**Privacy Act**), relevant privacy principles and codes govern the way in which we must manage your personal information. This policy sets out how we collect, use, disclose and otherwise manage personal information about you.

Our separate credit reporting policy sets out how we deal with credit-related information.

Collection

Types of information collected

We may collect and hold personal information about you, that is, information or an opinion about an identified individual, or an individual who is reasonably identifiable, whether the information or opinion is true or not and whether recorded in material form or not.

The types of personal information that we collect from you includes your name, date of birth, address, telephone/fax numbers, tax file number, bank account details (and if you are applying for loans, other financial information and credit-related information which is addressed under our separate credit reporting policy).

Purpose of collection

Personal information

The personal information that we collect and hold about you depends on your interaction with us. Generally, we will collect, use and hold your personal information if it is reasonably necessary for or directly related to the performance of our functions and for the purposes of:

- (a) providing services to you or someone else you know;
- (b) providing you with information about other services that we, our related entities and other organisations that we have affiliations with, offer that may be of interest to you;
- (c) facilitating our internal business operations, including the fulfilment of any legal requirements;
- (d) analysing our services and customer needs with a view to developing new or improved services;
- (e) evaluating and assessing your application for investments in our funds, issuing and managing your investment, providing facilities and services to you and undertaking appropriate administration.

Method of collection

Personal information

Personal information will generally be collected directly from you through the use of any of our standard forms, PDS, over the internet, via email, or through a telephone conversation with you. There may, however, be some instances where personal information about you will be collected indirectly because it

is unreasonable or impractical to collect personal information directly from you. We will usually notify you about these instances in advance, or where that is not possible, as soon as reasonably practicable after the information has been collected.

Failure to provide information

If the personal information you provide to us is incomplete or inaccurate, we may be unable to provide you, or someone else you know, with the services you, or they, are seeking.

Internet users

If you access our website, we may collect additional personal information about you in the form of your IP address and domain name.

Our website uses cookies. The main purpose of cookies is to identify users and to prepare customised web pages for them. Cookies do not identify you personally, but they may link back to a database record about you. We use cookies to monitor usage of our website and to create a personal record of when you visit our website and what pages you view so that we may serve you more effectively.

Our website may contain links to other websites. We are not responsible for the privacy practices of linked websites and linked websites are not subject to our privacy policies and procedures.

Use and disclosure

Personal information

Generally, we only use or disclose personal information about you for the purposes for which it was collected (as set out above). We may disclose personal information about you to:

- (a) service providers, who assist us in operating our business, and these service providers may not be required to comply with our privacy policy;
- (b) our related entities and other organisations with whom we have affiliations so that those organisations may provide you with information about services and various promotions;
- (c) if required to do so by law; and
- (d) our agents on the basis that they deal with such information in accordance with the Privacy Act.

The law also permits us to use or disclose personal information for other purposes in certain circumstances.

Security

We store your personal information in different ways, including in paper and in electronic form. The security of your personal information and sensitive information is important to us. We take all reasonable measures to ensure that your personal information and sensitive information is stored safely to protect it from misuse, loss, unauthorised access, modification or disclosure, including electronic and physical security measures.

Your personal will be stored in servers located in Australia for the purposes set out above. We are not likely to disclose your personal information overseas.

We take reasonable steps to ensure that the overseas recipient complies with relevant privacy principles in relation to your personal information and sensitive information.

Access

You may access the personal information and sensitive information we hold about you, upon making a written request. We will try to acknowledge your request within 14 days of its receipt, and to provide you with access to the information requested within 30 days. We may charge you a reasonable fee for processing your request.

We may decline a request for access to personal information or sensitive information in circumstances prescribed by the Privacy Act, and if we do, we will provide you with a written notice that sets out the reasons for the refusal (unless it would be unreasonable to provide those reasons).

If, upon receiving access to your personal information or sensitive information or at any other time, you believe the personal information or sensitive information we hold about you is inaccurate, incomplete or out of date, please notify us immediately. We will take reasonable steps to correct the information so that it is accurate, complete and up to date. If you wish to make a complaint about a breach of the Privacy Act, please contact us and we will take reasonable steps to address the complaint.

Feedback

If you have any queries or concerns about our privacy policy or the way we handle your personal information or sensitive information, please contact our privacy officer at:

Street address: 1065 Gold Coast Highway (cnr. Palm Beach Avenue), Palm Beach QLD 4221

Email address: dhl@ingwersen.com.au

Telephone: (07) 5589 2666

Facsimile: (07) 5534 2838

More information

For more information about privacy in general, you can visit the federal information commissioner's website at www.oaic.gov.au.