

## Privacy Policy

**INFINITY CAPITAL FINANCIAL PLANNING PTY LTD** respects your privacy and your right to control your personal information. We handle your personal information in accordance with the Privacy Act 1988 (Cth) and the Australian Privacy Principles. We are committed to protecting the personal information you provide to us and which we collect from you. This Privacy Policy sets out how we collect and deal with your personal information.

### Types of information collected and held

“Personal information” about you is information or an opinion about you or which is reasonably identifiable as you, whether or not the information or opinion is true and whether or not the information is recorded in a material form.

The types of personal information that we collect and hold will depend upon the service that you are seeking from us. Generally, such personal information will include your:

- name
- identification (e.g. driver’s license, passport)
- email address
- telephone number
- home address
- employment details
- tax file number
- bank account, superannuation and insurance details
- financial and investment information
- family details (e.g. name of your spouse and children)
- health information

### Sensitive information

We may collect information that is considered “sensitive information” under the laws, such as:

- any illnesses or health conditions that you may suffer
- your family health history
- details of your criminal record (if any)
- your membership of a professional or trade association

### How we collect and hold personal information

Infinity Capital Financial Planning generally only collects your personal information where you have knowingly and voluntarily provided it to us. This may occur in the following circumstances:

- you complete a Fact Find or client information sheet
- you provide information to us verbally when you meet with us or over the telephone or via email correspondence with us
- you submit your details to us via our website
- you provide us with identification for identification checks
- you email or call us to enquire about our services

We may collect some of your personal information from third parties, such as:

- your previous or other advisors from time to time
- by conducting public searches (e.g. with ASIC, LPI)
- you instruct us to contact your other advisors to obtain information about you.

Infinity Capital Financial Planning may hold your personal information in hard copy files and/or electronic files.

Infinity Capital Financial Planning takes reasonable steps to ensure that all personal information that we collect is kept secure in accordance with industry standard physical, electronic and managerial procedures. In respect of personal information collected online or stored electronically (including in the cloud) in particular, you acknowledge that no security system is impenetrable and that the security of such networks and systems can never be guaranteed. Infinity Capital Financial Planning also cannot guarantee that the information you supply will not be intercepted while being transmitted over the internet. Accordingly, any personal information which is transmitted to us is transmitted at your own risk.

Purpose for which we collect, hold, use and disclose personal information

Infinity Capital Financial Planning will use and disclose your personal information only for the purpose (the “**primary purpose**”) for which you provide it to us, which may include:

- to provide you with any services that you may request (including financial planning, mortgage broking, tax and legal services);
- to provide you with direct marketing communications and/or with relevant or interesting updates that may be relevant to you;
- to provide your information to a financial institution or issuer of financial products where you have agreed to invest your money;
- to refer you to a specialist adviser (e.g. an auditor or barrister);
- to respond to any query or complaint that you may make; and
- for internal administration and quality control purposes.

Your personal information may be provided to third party contractors engaged to perform functions or provide services relating to the purposes for which we collect personal information. If this is the case, we will take reasonable steps to ensure that they comply with this Privacy Policy.

We may also use and disclose your personal information if required or authorised by law or a court/tribunal order.

We will never sell your personal information. If Infinity Capital Financial Planning is acquired or merged with another entity or entities, your personal information may be shared with such other entity – subject always to the primary purpose for which your personal information was provided to Infinity Capital Financial Planning.

Access to and correction of Personal Information

Infinity Capital Financial Planning will take reasonable steps to ensure that any personal information we collect is up-to-date, complete and accurate, and any personal information that we use or disclose is up-to-date, complete, accurate and relevant.

You may request access to your personal information and you may seek the correction of such information by contacting our Privacy Officer at [info@infinitycapitalfp.com.au](mailto:info@infinitycapitalfp.com.au), on (03) 9682 6283 or at Level 1, 21 Shierlaw Avenue, CANTERBURY VIC 3126.

#### Complaints about a privacy breach

If you believe that we have breached the Australian Privacy Principles, you may direct your complaint to our Privacy Officer who will review your complaint and liaise with you directly to resolve your complaint.

#### Changes to Privacy Policy

If we change this Privacy Policy, we will post those changes onto our website at <https://www.infinitycapitalfp.com.au>. Amendments will be effective immediately upon being placed onto the website.

For a copy of Insight Investment Partners Privacy Policy, visit <http://insightmp.com.au/privacy-policy.html>.