



privacy statement

The Perspective Group is committed to complying with the Privacy Act requirements introduced in December 2001.

The Perspective Group may collect information about you for the following purposes:

- Provision of financial planning and investment services
- Completion of associated documentation and application forms
- Recruitment of staff
- To market services which may be supplied by the Perspective Group or by other suppliers that may be of interest to you, unless you inform us not to do so.
- To provide you with agreed services to assist in meeting your requirements, needs, goals and objectives

As the Perspective Group provides a number of service offerings, we are required under various legislative bodies and codes of practice to collect certain information about you in order to provide our range of services. These include, but are not limited to, the Corporations Act, Superannuation Guarantee Act, Income Tax Assessment Act, certain regulations issued by the Australian Securities and Investments Commission (ASIC), as well as the Rules of Professional Conduct of the Financial Planning Association.

Whilst you are not obliged to provide us with the information requested, if you decline to do so, we may be unable to provide the level of service and advice required and expected of us.

In connection with the provision of services, it may be necessary for us to disclose personal information about you to other professionals and organisations such as:

- Associated companies of the Perspective Group
- Financial institutions (including fund managers, financial advisors, stock brokers)
- Government departments eg. Australian Taxation Office, ASIC and Centrelink.
- External service providers and other compliance inspectors for audit purposes
- External parties for business acquisitions or in the event of the sale of the business
- Any other external party as authorised by your from time to time

We undertake not to use or disclose information collected, for purposes other than those detailed above, or related purposes, unless the law requires the disclose or we have been provided with your consent to do so.

The Perspective Group recognises how important the privacy of your personal information is to you. We will therefore, at all times, seek to ensure that the personal information collected and held by us is protected from misuse, loss, unauthorised access, modification or disclosure.

The Perspective Group is committed to ensuring that the personal information we hold is accurate, complete and up to date. If you believe that the personal information we hold about you is incorrect, we request that you contact us and we will take all reasonable steps to correct this information.

If at any time you wish to have access to the information we hold about you, (or if you would like a copy of our detailed Privacy Policy) you are welcome to request this by contacting us on (02) 9280-2441 or by e-mail at admin@perspectivegroup.com.au

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Disclaimer: The information contained in this publication is a summary only based on the requirements of the Privacy Act (Privacy Sector) 1998 and the National Privacy Principles issued September 2001.