

Ease the burden



# PRIVACY POLICY

[www.inwealth.com.au](http://www.inwealth.com.au)

Version 2.0

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## Change Log

Version	Date	Changes
1	17/5/2008	Original
2	12/3/2014	Updated to incorporate the Australian Privacy Principles

## Preamble

In Wealth Financial Services Pty Ltd (In Wealth) abides by the Australian Privacy Principles as contained in the Australian Privacy Act 1988.

We respect the confidentiality of the information you provide us pertaining to your clients. This document outlines how In Wealth will manage and protect the personal information you provide.

## Collecting personal information

In Wealth needs to collect personal information from you relating to your clients in order for us to provide you with a paraplanning service.

If such information is not collected, we are not able to fulfil our obligation to you.

### Will personal information be used for direct marketing

Personally identifiable information is only used for the purpose it is collected. This allows us to provide services to you.

No information collected by In Wealth is transferred or sold to third parties for the use of promotional marketing.

## What type of personal information is collected

In order to assist in the provision of services to you, the information we are exposed to in relation to your clients includes (but is not limited to) name, address, date of birth, contact details, income, assets and liabilities and employment details.

### Is sensitive information collected

Generally, the sensitive information In Wealth is exposed to pertains to a person's health.

We will only use or disclose sensitive information for the purposes for which it was provided.

### How is personal information collected

In Wealth will only be exposed to your clients' personal information as provided by you. Usually the information is provided electronically on forms completed by your employees.

We do not collect any other personal information from external sources.

## Managing your personal information

In Wealth protects the personal information you provide from misuse, unauthorised access and disclosure. Only those authorised will have access to the information provided.

In Wealth offers protection of personal information in the following ways:

- All authorised employees and contractors are instructed to respect the confidentiality and privacy of the individuals to which the information relates;
- All employees and contractors sign a confidentiality agreement with In Wealth;
- No sensitive information is kept on servers accessible from the internet;
- All confidential information relating to any services we provide is stored behind industry-standard firewalls to protect unauthorised access;
- Any personal or sensitive information on hardcopy is stored in lockable cabinets and is shredded when no longer required;
- Security measures such as identification codes and passwords to control access to authorised persons are in place.

## Who do we share the provided personal information with

The information that you supply is not shared with entities other than employees or contractors of In Wealth.

## How long is information retained

Information is saved electronically and retained for as long as legally required by our indemnity underwriters.

## How can In Wealth be contacted in relation to privacy

For more information on anything contained within this privacy policy or to make a privacy related complaint, please contact us:

- By telephone: 03 8390 4722
- By email: [admin@inwealth.com.au](mailto:admin@inwealth.com.au)
- In writing: PO Box 3768, Caroline Springs, Vic 3023

## How can you access personal information previously provided

Electronic files on personal information provided is maintained.

Upon request, we will provide you with all the information we have collected from you. Depending on the complexity of the request, we may charge a processing fee.