

Wheelhouse Advisory Pty Ltd - Privacy Policy

If you do not agree with this Privacy Policy, please do not use this Site. By accessing and using this Site, you hereby agree to the terms of this Privacy Policy.

Wheelhouse Advisory Pty Ltd is committed to providing quality services to you and this policy outlines our ongoing obligations to you in respect of how we manage your Personal Information.

We have adopted the Australian Privacy Principles (APPs) contained in the Privacy Act 1988 (Cth) (the Privacy Act). The APPs govern the way in which we collect, use, disclose, store, secure and dispose of your Personal Information.

A copy of the Australian Privacy Principles may be obtained from the website of The Office of the Australian Information Commissioner at www.aaic.gov.au

What is Personal Information and why do we collect it?

Personal Information is information or an opinion that identifies an individual. Examples of Personal Information we collect include names, addresses, email addresses and phone numbers.

This Personal Information is generally obtained either by face to face or online interviews, regular mail, over the telephone or by email and from third parties. We don't guarantee website links or policy of authorised third parties. From time to time additional or updated information may be collected through one or more of these methods.

We collect your Personal Information for the primary purpose of providing our services to you, providing information to our clients and marketing. We may also use your Personal Information for secondary purposes closely related to the primary purpose, in circumstances where you would reasonably expect such use or disclosure. You may unsubscribe from our mailing/marketing lists at any time by contacting us in writing.

When we collect Personal Information we will, where appropriate and where possible, explain to you why we are collecting the information and how we plan to use it.

Sensitive Information

Sensitive information is defined in the Privacy Act to include information or opinion about such things as an individual's racial or ethnic origin, political opinions, membership of a political association, religious or philosophical beliefs, membership of a trade union or other professional body, criminal record or health information.

Sensitive information will be used by us only:

- For the primary purpose for which it was obtained
- For a secondary purpose that is directly related to the primary purpose
- With your consent; or where required or authorised by law.

Third Parties

Where reasonable and practicable to do so, we will collect your Personal Information only from you. However, in some circumstances we may be provided with information by third parties. In such a case we will take reasonable steps to ensure that you are made aware of the information provided to us by the third party.

Use and Disclosure of Personal Information

We will not use or disclose personal information collected by us for any purpose other than:



- The purpose for which it was provided or secondary related purposes in circumstances where you would reasonably expect such use or disclosure; or Where you have consented to such disclosure; or Where the National Privacy Principals authorise use or disclosure where required or authorised under law, in circumstances relating to public health and safety and in connection with certain operations by or on behalf of an enforcement body. We are required under the rules of Professional Conduct of Chartered Accountants Australia New Zealand to make certain information available for inspection by the Institute on request, to ensure ongoing compliance with mandatory professional standards. This may involve the disclosure of your personal information. We are also obliged pursuant to the Corporations Act to maintain certain transaction records and make those records available for inspection to the Australian Securities and Investment Commission.
- We may use the personal information collected from you for the purpose of providing you with material and articles that may be of
- interest to you, however, you may, by contacting us, request not to receive such information, in which case we will immediately honour your request. Third parties where you consent to the use or disclosure; and
- Where required or authorised by law.

Security of Personal Information

Your personal information is generally held in your client file. Information is also held on a computer database.

We will 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. At all times your personal information is treated as confidential. Access to our premises is security controlled by allowing only personnel with the appropriate security passes or keys to gain access to our premises.

Documents that are not current but must, by law, be held for a number of years, are stored off site in secure archive facilities. These documents may only be accessed by authorised Wheelhouse Advisory staff. All computer-based information is protected through the use of access passwords on each computer. Data is backed up each evening and stored securely off site.

Access to your Personal Information

You may access the Personal Information we hold about you and to update and/or correct it, subject to certain exceptions. If you wish to access your Personal Information, please contact us in writing.

Wheelhouse Advisory Pty Ltd will not charge any fee for your access request but may charge an administrative fee for providing a copy of your Personal Information.

In order to protect your Personal Information we may require identification from you before releasing the requested information.

Non-Personal Information Collected Automatically

Please note that while there are always risks associated with providing personal data, whether in person, by phone or over the Internet, and no system of technology is completely safe, "tamper" or "hacker- proof", Wheelhouse Advisory has endeavoured to take appropriate measures to prevent and minimize risks of unauthorized access to, improper use and the inaccuracy of your personal information.

Maintaining the Quality of your Personal Information

It is an important to us that your Personal Information is up to date. We will take reasonable steps to make sure that your Personal Information is accurate, complete and up-to-date. If you find that the information

we have is not up to date or is inaccurate, please advise us as soon as practicable so we can update our records and ensure we can continue to provide quality services to you.

On-line Technology

The Wheelhouse Advisory website may from time to time contain links to other websites whose operators may or may not adhere to a privacy policy or be governed by the Australian National Privacy Principles.

Policy Updates

We may change this Privacy Policy, or change, modify or withdraw access to this Site, or the content of these pages at any time with or without notice.

How to contact us

If you seek any further information from Wheelhouse Advisory or have any complaints about this statement or our privacy policy generally, please contact:

A: Level 2, 2 Drewery Place, Melbourne VIC 3000

E: info@whadvisory.com.au T: 03 8560 2710

