



Privacy Policy

Your financial adviser, Phillipsons Financial Planning Pty Ltd, is committed to protecting the privacy of your personal information. Below is some information about how your personal information will be handled by us.

Collecting your personal information

Phillipsons Financial Planning Pty Ltd, an Australian Financial Services Licensee, collects your personal information for a variety of purposes, including providing you with the financial services that you have requested (such as providing you with financial advice), managing your financial adviser's relationship with you and contacting you about products and services in which you may be interested. Phillipsons Financial Planning Pty Ltd may also be required to collect your personal information pursuant to legislation and regulatory requirements. If the personal information requested by Phillipsons Financial Planning Pty Ltd is not provided, your financial adviser may not be able to provide you with financial services, including providing you with financial advice that is appropriate to your investment needs, objectives and financial circumstances.

Using and disclosing your personal information

Your personal information may be used and disclosed by Phillipsons Financial Planning Pty Ltd for the purposes outlined above and for related purposes.

The types of service providers to whom Phillipsons Financial Planning Pty Ltd may provide your personal information are:

- other financial advisers and organisations involved in providing the financial services you have requested (which may include ongoing services) such as fund managers who assist us in providing financial advice and paraplanners
- insurance providers, superannuation trustees and product issuers in connection with the provision to you of the financial services you have requested
- organisations that assist in operating a financial planning business such as those that provide administrative, financial, accounting, insurance, research, legal, computer or other business services
- your representatives or service providers such as your accountant, solicitor, tax agent, stockbroker or bank
- organisations involved in a business restructure or a transfer of all or part of the assets of Phillipsons Financial Planning Pty Ltd
- government authorities and other organisations when required by law
- organisations that you have consented to your personal information being disclosed to.

Gaining access to your personal information and contacting Phillipsons Financial Planning Pty Ltd

You can gain access to your personal information held by Phillipsons Financial Planning Pty Ltd. In some circumstances allowed by law, request for access can be denied.

For more information about privacy in general, you can visit the Federal Privacy Commissioner's website at: www.privacy.gov.au

Contact us

To gain access to your personal information held by Phillipsons Financial Planning, please contact us:

Phillipsons Financial Planning Pty Ltd

388 Raymond Street

Sale Vic. 3850

Phone: 03 5144 5207

Fax: 03 5143 3419

Email: fp@phillipsons.com.au