

## **Your Personal Information and Privacy**

The privacy of your personal information has always been important to us at End2End.

This statement is an outline of certain matters relating to the collection and handling of your personal information by End2End.

### **Collecting your personal information**

As a financial services organisation we are subject to certain legislative and regulatory requirements which necessitate us obtaining and holding detailed information which personally identifies you and/or contains information about you ("personal information"). In addition, our ability to provide you with the relevant product or service is dependent on us obtaining certain personal information about you, including:

- (a) employment details and employment history;
- (b) details of your financial needs and objectives;
- (c) details of your current financial circumstances, including your assets and liabilities (both actual and potential), income, expenditure, insurance cover and superannuation;
- (d) information about your employment history, employment circumstances, family commitments and social security eligibility.

Failure to provide the personal information referred to above may affect the adequacy or appropriateness of products or services recommended to you.

Generally collection of your personal information will be effected in either face-to-face interviews, over the telephone, via email, or from a third party whom you have authorised to provide that information to us. From time to time additional and/or updated personal information may be collected through one or more of these methods.

### **Information use and disclosure policies**

We will not disclose Personal Information collected by us for any purpose other than:

- (a) the purposes for which it was provided or secondary related purposes in circumstances where you would reasonably expect such use or disclosure; or
- (b) where you have consented to such disclosure; or
- (c) where the National Privacy Principles authorise us 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 may use the personal information collected from you for the purpose of providing you with direct marketing material such as articles that may be of interest to you, however you may, by contacting us by any of the methods detailed below, request not to receive such information and we will give effect to that request. Please allow 2 weeks for your request to be actioned.

We may disclose your personal information to superannuation fund trustees, insurance providers, and product issuers for the purpose of giving effect to your financial requirements and the recommendations made by us.

## **Document storage and security policies and practices**

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 time your personal information is treated as confidential and any sensitive information is treated as highly confidential. All paper files are stored in lockable cabinets which are locked out of hours. Access to our premises is controlled by allowing only personnel with security codes to access the premises. All computer based information is protected through the use of access passwords on each computer and screen saver passwords. Data is backed up each evening and stored securely off site.

In the event you cease to be a client of this organization, any personal information which we hold about you will be maintained in a secure facility for a period of 7 years in order to comply with legislative and professional requirements, following which time information will be destroyed.

## **Gaining access to your personal information**

You may at any time, by contacting us by any of the methods detailed below, request access to your personal information and we will provide you with access to that information either by providing you with copies of information requested, allowing you to inspect the information requested or providing you with an accurate summary of the information held. In some cases, we may be able to deal with your request over the telephone. This is subject to some exceptions allowed by law. We will provide you with an explanation in the event we refuse you access to your personal information.

## **Correction policies and procedures**

We will endeavour to ensure that, at all times, the personal information about you which we hold is up to date and accurate. In the event that you become aware, or believe, that any Personal Information which we hold about you is inaccurate, incomplete or outdated, you may contact us by any of the methods detailed below and provide to us evidence of the inaccuracy or incompleteness or out datedness and we will take all reasonable steps to correct the information.

You may amend or update your registration details by sending an e-mail to the e-mail address noted below providing your amended details. Please allow 2 weeks for your request to be actioned.

## **Complaints resolution**

If you wish to complain about any breach or potential breach of this privacy policy or the National Privacy Principles, you should contact us by any of the methods detailed below and request that your complaint be directed to the Privacy Officer. Your complaint will be considered within 7 days and responded to. It is our intention to use our best endeavours to resolve any complaint to your satisfaction, however, if you are unhappy with our response, you are entitled to contact the Office of the Privacy Commissioner who may investigate your complaint further.

## **Consent**

It is our practice to seek your consent to use or disclose your personal information to tell you about other promotions or opportunities in which you may be interested. This may be done after an initial marketing contact from our Call Centre. We assume we have your consent to use service providers to assist us with this, unless you tell us otherwise.

**Contact Details**

Privacy Officer: Donna Bye  
Address: End2End Pty Ltd  
Level 1, 42 Siganto Drive, Helensvale  
(PO Box 2226, Nerang BC Qld 4211)  
Telephone: 1300 227 469  
Facsimile: 1300 264 662  
e-mail: donna@end2end.com.au

**Additional privacy information**

Further information on privacy in Australia may be obtained by visiting the web site of the Office of Federal Privacy Commissioner at <http://www.privacy.gov.au/>.