

PRIVACY DISCLOSURE STATEMENT

In order to comply with the requirements of the Privacy Act, we are required to advise you that this firm holds personal information about you. The information has been and will continue to be collected by us for the purpose of providing you with financial services including:

- a) the preparation of your financial plan;
- b) the provision of financial planning advice to you;
- c) making securities and investment recommendations;
- d) reviewing your financial plan;
- e) reviewing securities and investment recommendations; and
- f) for other related matters.

We are required, pursuant to the Corporations Act, certain regulations issued by the Australian Securities and Investments Commission and the Rules of Professional Conduct of the Financial Planning Association, of which this organisation is a principal member, to collect information about you for the purpose of providing you with the services referred to above. If you do not provide us with the information requested by us we may not be able to provide you with the services required.

We will from time to time disclose information about you to authorised representatives of this firm and to other professionals, insurance providers, superannuation trustees and product issuers in connection with the purposes detailed above. In the event we consider it necessary to use or disclose information about you for purposes other than those detailed above, or related purposes, we will seek your consent.

You are entitled to obtain access to the information which we hold about you by contacting the AFS' Head of Compliance on 03 8320 1517 or by writing to P O Box 630, Collins Street West PO, Melbourne, Victoria 8007.