

**PaxAnimi® Estate Planning Pty Ltd**

**Our Privacy Policy**

This document deals with Our obligations to You under the Australian Privacy Principles about Your personal information that We may hold from time to time (other than for Our current and former employees).

**What personal information do We collect about You**

We collect the following personal information about You:

- Your name
- Your address
- Your telephone numbers
- Your mailing and email address
- what goods or services You may have purchased from Us
- the cost of those goods or services
- what you want to happen under your wills, powers of attorney and guardianship appointment
- credit card and bank payment details

**How We collect Your personal information**

Normally, We collect Your personal information only directly from You.

We collect personal information about You whenever You have a dealing with Us including if You:

- have contact with Us in person
- order any of Our services
- pay an amount You owe Us by credit card
- correspond with Us via telephone, facsimile, email or letter
- subscribe (electronically or otherwise) to any of Our publications.

We will not collect “sensitive information” about You, being information or an opinion about Your racial or ethnic origin, political opinions, membership of a political association, religious beliefs or affiliations, philosophical beliefs, membership of a professional or trade association, membership of a trade union, sexual preferences or practices or criminal record that is also personal information or health information about You or genetic information about You that is not otherwise health information.

We might get personal information about You from a third party. This could happen for example if We are given Your personal information:

- by Your employer
- by your accountant
- by your financial adviser
- by your lawyer
- by a business that You provide services to
- by a credit reporting or rating agency

## **Our privacy policy**

- by an information service provider
- from a publicly maintained record like an electoral role or directory
- by a party with whom You may have had dealings

We log how Our Website is used. This is no different from most businesses. The information We log is not linked to You personally in any way (the information is anonymous). Typically it records Your:

- Internet Service Provider
- Date and time of Your visit
- Pages accessed and the documents downloaded
- Search items entered

## **The purpose for which We collect Your personal information**

Normally, we collect personal information for these reasons:

- providing Our goods and services to You and others
- considering whether We will employ someone
- considering whether We will contract someone to provide goods and services to Us
- receiving goods and services provided by You or Your employer
- telling You about the goods and services We supply
- sending information to You about Our business and/or the goods and services We supply
- advising You of events about Our business as they happen (market changes, seminars, marketing activities)

If You don't provide Us with Your information, We may not be able to fulfill the purpose for which We collect the information.

## **Your obligation when You provide Us with third party information**

If You or Your organisation is subject to privacy law and You provide personal information to Us about someone, You promise Us that:

- You are entitled to disclose that information to Us
- We may collect, use and disclose that information for the purposes described in this document

## **How We use or disclose Your personal information**

We only use and/or disclose Your personal information for the purpose for which We collect it.

We may also use and/or disclose personal information for purposes such as:

- invoicing
- reminder notices
- provision of information about market developments
- invitations to seminars and other events
- Our own market research
- improving Our service and communications

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- advising You about other services We offer
- giving it to suppliers of services to Our business in order that We can provide Our services to You
- giving it to suppliers of services to Our business in order that they can provide services to Us (eg archiving completed files)

We will not disclose personal information collected by Us to third parties for the purpose of allowing them to direct market any products and services to You.

### **How We protect Your personal information**

We will not disclose personal information collected by Us to third parties for the purpose of allowing them to direct market any products and services to You.

We take reasonable steps to protect Your personal information that We hold from misuse and loss.

We also take reasonable steps to protect the information from unauthorised access, modification and disclosure.

Your personal information may be stored by Us either in hard copy documents or as electronic data in Our information technology systems.

We maintain a high level of physical security over Our hard copy and electronic data stores and premises, such as locks, alarms and barrier systems.

We also maintain a computer and network security system. We use firewalls and other security systems in Our electronic communications systems, such as user identifiers and passwords to control access to Our computer network.

Our staff are made aware of their confidentiality obligations and their limited access rights as they apply to them in respect of Your information. Staff normally only have access to information on a need to know basis.

### **Disclosing Your personal information overseas**

We do not provide your personal information to overseas recipients.

### **Gaining access to information We hold about You**

We will give You access to Your personal information except if the Privacy Act does not require Us to or where We have a legal duty of confidentiality or non-disclosure.

The information will be supplied within a reasonable time from the date of Your request.

We reserve the right to recover reasonable costs from You in giving You the access.

If We refuse You access to any information, We will give You an explanation.

### **Maintaining currency of Your personal information**

We ensure that all reasonable procedures are followed so that Your personal information is accurate, complete and up to date whenever We collect or use it.

If any of the personal information held by Us about You is inaccurate, incomplete or out of date, please contact Us immediately and We will take all reasonable steps to update it.

### **Sharing information within the PaxAnimi® group**

You agree that We may disclose personal information to other members of Our group (eg a holding, subsidiary or sister company) that will use and disclose the information in accordance with this document.

## **Our privacy policy**

### **Contacting Us including making a complaint**

If You:

- want to access Your personal information
- want to lodge a complaint about any breach by Us of Your privacy
- have a question about how Your personal information is collected, used or disclosed by Us
- have a question about anything relating to Our Privacy Policy,

please contact us on:

E: [support@paxanimi.com.au](mailto:support@paxanimi.com.au)

### **If You make a complaint**

If You make a complaint to Us about Our management of Your personal information, We will:

- review the complaint
- seek to contact You and discuss Your complaint with You
- notify You about the outcome of Our review of Your complaint and the action We will take
- implement any outcome arising from the complaint

If You are not satisfied with the outcome of Your complaint, You can seek a review by contacting the Office of the Australian Information Commissioner.