

# Your privacy & IMB Financial Planning

## PRIVACY NOTICE

Your privacy is important, and **IMB Financial Planning** is committed to protecting any personal information you provide.

This notice provides you with an overview of how IMB Financial Planning Ltd (“we”, “us”, “our”) handles your personal information. Our Privacy Policy provides additional information such as how you can ask for access to personal information we hold about you and how to seek correction of that information. It also explains how you can complain about our handling of your personal information or a breach of the Privacy Act and how we will deal with your complaint. Our Privacy Policy is located at [www.imb.com.au/privacy](http://www.imb.com.au/privacy) and can also be obtained by calling us on 02 4262 9050.

We may collect and use your personal information:

- to provide you with information about a product or service;
- to assess any application or request for advice, a product or service;
- to provide, manage and administer the advice, products and services you seek;
- to communicate with you about us and the products and services on which we may advise you;
- as required under various Australian laws and regulations including the Anti-Money Laundering and Counter Terrorism Financing Act 2006.

If you do not provide some or all of the information requested we may not be able to provide you with the advice or products and services that you seek.

We may also collect information about how you use our website or other websites containing our information or advertisements. We use this information to help us better tailor our services to you. Generally this information is derived from cookies and does not identify you. Please refer to our Website Policy at [www.imb.com.au/privacy](http://www.imb.com.au/privacy) for information about how we use cookies. If we do identify you with this information, we will only use or disclose it in accordance with our Privacy Policy and the Australian Privacy Principles.

We will generally only collect your personal information directly from you. Sometimes we may obtain your personal information from third parties, such as:

- our related entities – to better manage our relationship with you ;
- other financial services providers and AFS Licencees (such as insurance providers)– to provide you with information about products and services we think may be of interest to you;
- marketing companies – who have provided us with your contact information so that we can tell you about our products and services.

We may disclose your personal information to:

- our parent company IMB Ltd, or a related entity, subsidiary or joint venture company;
- other financial service providers and AFS Licencees with whom you wish invest or whom are involved in the administration of your investments;
- organisations who perform services on our behalf including but not limited to those involved with the implementation of financial advice recommendations, mailing services, payment processing services, document storage services, data verification services, information technology support services including for the purpose of systems development and product development, insurers, research providers, platform operators, fund custodians and administrators, and professional advisers including accountants, lawyers and auditors;
- your representative, for example a lawyer, financial adviser, superannuation fund representative, broker or someone you have appointed to act on your behalf;
- Government and regulatory authorities if required or authorised by law.

We may disclose your personal information overseas. Refer to our Privacy Policy for the locations to which we are likely to disclose your personal information. If we do disclose personal information outside of Australia, we will only do so as required, and in accordance with our Privacy Policy.

We would like to keep you up to date on the advice, products and services we offer, including those issued by IMB Ltd or other financial services providers, which we consider may be of interest to you. To do this we may communicate with you, including by using any email address, mobile phone number or the details of any other electronic medium you have provided to us. You can opt out of receiving these communications at any time by calling 02 4262 9050.

If you would like more information about your privacy, you can contact us as follows:

Mail: Level 1 205 Crown Street Wollongong NSW 2500 Australia.

Phone: 02 4262 9050

Online: at [www.imb.com.au](http://www.imb.com.au), using our online enquiry form.