

Privacy Policy

Adviseable takes the matter of client privacy seriously, and we're committed to protecting the confidentiality of any personal information that we collect. Listed below is an overview of how we collect and manage all personal information, as conducted within accordance of the 'Privacy Act 1988':

What is 'personal information'?

This is any information that can be used to personally identify an individual, or private information that is specific to an individual's circumstances. Such information might include; an individual's name, residential address, phone number, email address, or any other relevant information that is collected whilst facilitating the delivery of our service.

How do we collect 'personal information'?

We collect personal information in a variety of ways, such as:

- Via email
- Over the phone
- In person
- Through our website
- At events
- Hard copy forms and formal documents
- From third party referrers
- As provided to us by a client's adviser or legal representative (upon the client's request)

How do we use 'personal information'?

Personal information may be collected for the following purposes:

- To promote and share information regarding our service offering
- To facilitate the delivery of our service
- To administer the delivery of our service (which may include contacting third party professionals on a client's behalf)
- As required by any laws, regulations, or codes that we're obligated to follow as professionals

What is our policy regarding the sharing of 'personal information'?

Under no circumstances will Adviseable sell personal information, or share it with a third party for any reason not described within this Privacy Policy brief. However in order to maintain a high standard of service delivery, as outlined within the 'How do we use

'personal information'? section above, we may need to disclose personal information to third parties at the individual's discretion. These third parties may include:

- The property 'selling party' (i.e. real estate agent, builder, developer, etc)
- The client's advisor (i.e. accountant, financial planner, mortgage broker, etc)
- The client's legal representative (i.e. solicitor, conveyancer, etc)
- Professionals that may need to be contacted on a client's behalf (eg. property manager, building inspector, quantity surveyor, etc)
- Regulatory bodies (eg. the Australian Tax Office, Austrac, etc)
- Organisations that implement and maintain our business systems (eg. IT providers, CRM administrators, etc)

Are we likely to share 'personal information' with third parties located overseas?

No. Our business activity and marketing initiatives do not include interaction with professionals outside of Australia. As such, the likelihood of us sharing an individual's personal information with third parties located overseas is nil.

What if an individual doesn't wish to provide us with their 'personal information'?

Our policy is to provide individuals with the option of using a pseudonym or not disclosing their personal information when communicating with us. However, this is based on the assumption that it is lawful to do so, and bearing in mind that if an individual chooses to use a pseudonym or not disclose their personal information we may not be in a position to:

- Ensure that the individual's identity can be verified and/or kept protected against fraud
- Facilitate the delivery of our service
- Administer the delivery of our service
- Share information of interest regarding our service offering

What is our policy regarding direct marketing?

From time to time we may conduct direct marketing initiatives to promote and share information regarding our service offering. These direct marketing initiatives can involve communication via email, mail, telephone/SMS, and are conducted within accordance of relevant marketing laws (such as the 'Spam Act 2003').

How does one 'opt out' of receiving our direct marketing?

An individual can opt out of receiving communication from us via our direct marketing initiatives at any time. This can be done simply by notifying us via the following methods:

- Select the 'unsubscribe' option often found within our marketing emails
- Email: info@adviseable.com.au
- Phone: 1300 077 677

- Mail: Adviseable Pty Ltd
PO Box 380
Waverley NSW 2024

What security measures do we adopt to protect ‘personal information’?

We take all necessary precautions to ensure that any personal information that we hold on file is best protected at all times. For example, we adopt the following practices to enforce the security of personal information; encryption and password protection, firewall protection, anti-virus software, secure office and file access, personnel training and workplace policies.

Can one access their ‘personal information’ that we hold on file and/or request that it’s updated?

Yes. If an individual wishes to review their personal information that we hold on file and/or request that it’s updated, this can be accommodated simply by contacting us via the following methods:

- Email: info@adviseable.com.au
- Phone: 1300 077 677
- Mail: Adviseable Pty Ltd
PO Box 380
Waverley NSW 2024

Contact us

For further information on our Privacy Policy, or to register any complaints or alert us of any possible breaches pertaining to our Privacy Policy, please contact us via 1300 077 677 or info@adviseable.com.au

This policy was last updated on 1st November 2019