

Date of Issue: 14 February 2009

Strategic Planning Partners privacy policy is documented as follows:

### **Your Privacy and Strategic Planning Partners**

Your privacy is important, and Strategic Planning Partners is committed to protecting any personal information you give us. With the privacy laws in effect from December 2001, this policy explains what information we collect from you, how we collect and use that information, and how your privacy is safeguarded.

#### **Information we collect**

Strategic Planning Partners needs to collect personal information from you to provide you with financial services and products. As we are required pursuant to the Corporations Act to collect sufficient information to ensure appropriate advice can be given in respect of recommendations made to our clients, if you elect not to provide us with the personal information required, we may not be able to assist you with our services.

We will not collect, use or disclose information about your racial or ethnic origin, political opinions, memberships of a political association, religious beliefs or affiliations, philosophical beliefs, memberships of a professional or trade association or trade union, sexual preferences or practices, criminal record or health information unless you have given us express consent to do so or unless it is required by law.

Your Tax File Number (TFN) is governed by special legislation and is also protected when you provide it to us.

#### **How we collect information**

Strategic Planning Partners collects personal information when you complete the attached questionnaire, an application form, or when you give us information by telephone or internet, or through your financial planner, accountant or lawyer.

We may also collect information from our website ([www.sppgroup.com](http://www.sppgroup.com)) for internal purposes but not information that can identify you. This may include: number of users who visit the site; date and time of visits; number of pages viewed and traffic patterns. To collect this information we use 'cookies', or small computer data files that are saved on the hard drive. These cookies do not contain any personally identifying information.

#### **Use and disclosure of information**

The information you give us is strictly confidential for use within the Strategic Planning Partners group. We will not reveal, disclose, sell, distribute, rent, licence, share or pass your information to third parties, other than to service providers such as fund custodians and insurance providers – as may be necessary for you to receive services from us. We may also provide your information to your accountant or lawyer when required to implement financial planning advice, or on request.

Strategic Planning Partners may also use your personal information to communicate with you about your investments and to tell you about new products and services that may be useful to you. While some communications are required by law, if you prefer we can remove your name from our mailing list for additional information. If you wish us to remove your name, please contact us (details follow). We will not use your information for any other purpose than is specified here unless you have consented or it is for another related purpose that is within your reasonable expectations.

#### **Access to your personal information**

Generally, you may access any personal information that Strategic Planning Partners holds about you by contacting us (a fee may apply). In specific circumstances, Strategic Planning Partners may be unable to provide access to your personal information; if so, we will explain why.

#### **Contacting Strategic Planning Partners**

To update your information, remove your name from our mailing list, access your information or if you have an inquiry or complaint, please contact Client Services on (07) 5554-1000 or write to Strategic Planning Partners at: Strategic Planning Partners, PO Box 290, Nobby Beach Qld 4218.