

Privacy Policy

Your privacy is very important to us and we are committed to protecting personal information we may hold and manage at any time in accordance with Concise Super's ongoing obligations by law; the Privacy Act 1988 (Privacy Act).

DEFINITIONS:

personal information means information about an entity who is either identified in the information or their identity is ascertainable from it and includes information and opinions from you or from a third party;

we, us, our, organisation and Concise Super refers to the business; Investments For Us Trust Pty Ltd atf Investments For Us Trust trading as Concise Super (ABN 93 600 595 964);

you means any person and related legal entity whose personal information is held by us.

COLLECTION:

Collection of personal information is obtained in various ways including interviews, meetings, correspondence, by telephone and email, via our website www.concisesuper.com.au, from your website, from media and publications, from other publicly available sources, from cookies and from third parties.

We collect your personal information for the primary purpose of providing our services to you and information to our clients. We may also use your personal information for secondary purposes closely related to the primary purpose, in circumstances where you would reasonably expect such use or disclosure, for example marketing and market research.

Due to the nature of our services provided as well as government regulations and taxation law, we are required to ask for personal information from our clients. Some types of personal information include but are not limited to; name, address, telephone number, date of birth, bank account details, tax file numbers, tax and financial statements, employment details, whether a client is an Australian citizen and opinions. Some types of sensitive information include but are not limited to; ethnic origin and criminal record.

We also collect information from clients as their capacity as trustees, company directors and officers due to the nature of our services provided as well as government regulations and taxation law, we are required to ask for sensitive information from our clients.

In some circumstances we may receive information by third parties, in such cases we will ensure you are contacted by the third party to confirm your consent to release the information to us.

DISCLOSURE:

We will use your personal information for the purpose for which you have provided it. We may use it for other purposes where:

you have provided verbal or written consent;

you would reasonably expect the information to be supplied ie. government agency, Australian Taxation Office, Australian Securities and Investments Commission;

other persons are acting on your behalf, including financial advisors, accountants, auditors, solicitor, legal person representative, trustee, power of attorney;

we order goods or services on your behalf from suppliers ie. order legal documents, actuarial certificate etc;

we are required or authorised by law.

SECURITY:

Your personal information is stored in a manner that reasonably protects it from misuse, loss and from unauthorised access, modification or disclosure. We have processes and policies in place to ensure the security of your personal information at our organisation, for example onsite and offsite back up of data, electronic storage of data, security for all pc's, network and internet, passwords, shredding of paper documents, education of staff on how to treat personal information, secure client portal to send and retrieve information that contains personal information, tax file numbers, bank account details etc.

Most of your personal information will be stored in client files for at least seven (7) years as required by law.

Personal information that is no longer needed for the purpose for which it was obtained will be destroyed and or deleted in a reasonable manner.

ACCESS:

We aim to ensure all your personal information we hold and manage is accurate and up to date. If you believe that, information we hold about you is incorrect, incomplete or out dated, please advise us immediately. We will make the necessary changes within a reasonable time frame.

You have the right to access the personal information we hold, subject to exceptions. In order to protect your personal information, we may require identification and confirmation that we are providing the information to the correct person before we release the requested information. We will respond to the request within a reasonable time frame.

SUBSCRIBE/UNSUBSCRIBE:

We offer free e-newsletters and information on our website that includes news, information and updates.

You may unsubscribe from our marketing database at any time using the following options;

Send us an email at admin@concisesuper.com.au requesting, 'please remove me' in the subject line;

Send a message via our website's contact us form;

Click on the unsubscribe link at the bottom of the email.

WEBSITE AND EMAILS:

We may collect your personal information from you if you use our website and electronic mail. When using our website we may collect the following information; your IP address, date and time of visit, the pages you accessed and the documents you downloaded, search terms you used, previous site visits and the type of browser used, top level domain name, any cookies that your browser has presented on our server.

We do not collect identifiable personal information about you if you only browse the website.

Concise Super may use cookies to link our affiliates in order to ensure proper tracking. Cookies are also used to keep track of who accesses our site.

Our website contains links to third party websites. These links are created for your convenience. We recommend you review the third party's websites privacy policy when using their website.

We measure website analytics regarding website traffic to and from Concise Super website. This information does not contain personal information.

There are security risks when using the internet, you should assess these risks and the information you supply via the internet.

We recommend you keep your secure client portal user name and password in a safe place. We do not have access to your password.

POLICY INFORMATION:

This policy is reviewed and updated from time to time to ensure it is updated with new laws, technology and industry changes and organisation policies. Updated versions will be published on our website.

If you have any questions regarding the privacy policy, to change your personal information, apply to access your information or complain about the policy please contact us by telephone 03 9838 3055 or email admin@concisesuper.com.au

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