



PRIVACY POLICY

Our Approach to Privacy

Wright Evans Partners ("WEP") is committed to providing you with the highest levels of service. Wright Evans Partners understands the importance of personal information privacy and are committed to the protection of your personal information which we hold. Wright Evans Partners is subject to the Commonwealth Privacy Act 1988, including the National Privacy Principles.

This policy sets out the way in which WEP and its related businesses collects, uses and discloses personal information. WEP may amend this policy from time to time.

What Personal Information do we collect?

1. *Personal Information* is any information or opinion from which an individual's identity may be ascertained. WEP only collects information that is necessary to assist us in providing our services. We do not collect personal information unless we first ask you for it or you provide it to us.

Examples of the types of information we collect include:

- your individual or your entity's identity and contact details;
- financial information;
- information as required by taxation law and corporations act.

How We collect Personal Information?

2. WEP collects information about you (individuals and entities) in a number of different ways including:
 - directly from you or when you provide information electronically or in documents;
 - from external sources and other third parties such as : Australian Security and Investments Commission (ASIC), Fund Managers, Australian Taxation Office (ATO);
 - WEP collects information when you make contact with us to enquire about our services;
 - other personal information collected by us from publicly available sources.

What are the Consequences of not providing us with relevant information

3. If you do not provide us with the information we request, our ability to provide our high standard of service may be compromised.
 - Our advice may be inaccurate or incomplete.
 - We may be unable to provide certain services as required or on a timely manner.
 - In certain circumstances failure to provide some information may result in documents being submitted to the ATO, ASIC or other statutory bodies late and possibly incurring penalties.

Why We collect personal information and how it is used

4. WEP collects information to provide you with a specific service. We may use the information you provide to us for a number of purposes such as:
 - ATO reporting requirements;
 - applying for loans or finance;
 - ASIC requirements;
 - managing client relationships and improve the services we provide;
 - administering and managing those services, including charging, billing and collecting debts;
 - advising you of events, business opportunities and service provision available to them;
 - providing you with news and information relevant to you.

Your personal information is also collected to promote and market other services which we consider may be of interest to you. You may notify us at any time that you do not wish to receive marketing or promotional material by contacting our privacy manager.

We do not collect sensitive information such as an individual's religion; race; political opinion; religious beliefs or affiliations; sexual preferences; or criminal records. There may be exceptions to this rule, such as where collection is required by law.

Disclosure of Personal Information

5. Our firm does not sell, exchange, trade or otherwise supply to third parties any personal information obtained from you without your prior consent.
6. With your prior consent, we may disclose information about you to various organisations and/or parties in order to fulfil our services. These organisations include for example:
 - Australian Taxation Office (ATO);
 - Australian Securities and Investment Commission (ASIC);
 - Institute of Chartered Accountants in Australia (ICAA) Quality Control;
 - Superannuation authorities.

When your personal information is no longer used by WEP we may be limited by legislative requirement to retain records for a period of time before destroying it.

How is your personal information kept secure?

7. WEP intends to protect the quality and integrity of personal information kept about you. WEP has implemented appropriate industry standard techniques, technological and organisational measures to protect against loss, misuse and/or alteration of the information under our control.

These measures include:

- Server Encryption and site monitoring;
- Computer Firewalls, anti-virus & intrusion detection;
- Computer password authentication;
- Offsite data backup;
- Confidentiality clauses in employment agreements;
- Bound by the Rules of Ethical Conduct of the ICAA and CPA;
- Computer, Internet and Email Policy;
- Building Security;
- Restricted access to firm premises;
- Unique client identifiers.

Access and Accurate Information

8. WEP takes all reasonable precautions to ensure that the personal information we collect, use and disclose is accurate, complete and up-to-date. However, the accuracy of the information we hold depends to a large extent on the information you provide.

You have a right to access your personal information (subject to the Act), subject to some exceptions allowed by law. If you would like to do so, please let us know by contacting your accountant or our Privacy Manager. You may be required to put your request in writing for security reasons. We will not charge you for responding to such a request, unless we incur costs in providing the information.

How to contact us

For any complaints regarding a possible breach of privacy, or if you have any questions or feedback in relation to privacy, contact our Privacy Manager.

Contact Details:

Phone: +61 8 8208 4777
Facsimile: +61 8 8208 4778
Email: info@wepartners.com.au
Address: PO Box 897, Unley SA 5061
Office hours: 8.30 am and 5.30 pm EST, Monday to Friday.