

PRIVACY POLICY

Commercial Brokers Australia P/L A.B.N 70 107 570 936

Kayser Investments P/L A.B.N 70 603 317 602

PO Box 3263, Newstead Qld 4006

Ph: 0468 513 135

Email: angie@wealthconnectfin.com.au

What information is collected?

At the time of taking an application personal information is collected such as: full names, addresses, DOB, employment details and copies of identification.

Along with personal information, financial information is also collected consisting of, but not limited to: Assets and liabilities statements, business/personal financial statements and tax returns, group certificates, pay slips and account statements.

How is information collected?

Personal information is collected at the time of interview, if it is not available at the time it is provided to us by email or post.

How is the information used?

Your information is used for the purposes of a finance application and is provided to financial institutions in relation to this purpose only. Information is provided electronically by email.

Your contact details are added to our database as being a client of this office. The information is not disclosed to any third parties, other than financial institutions in regard to your application.

Your information may be disclosed to third parties such as Financial Planners, Accountants and Solicitors. However, this is not done without your prior authorisation.

We may contact you from time to time via post or email. You are able to opt out at any time by *unsubscribing* or contacting me on email at angie@wealthconnectfin.com.au.

Storage of information

Your personal information is required to be retained by this office for a period of 7 years from the date of your most recent application.

Financials and tax returns are held for 2 years after which time they are destroyed. This information when current is stored electronically - Tax File Numbers are removed and not recorded on any documentation held.

All electronic information is stored on a central server and can only be accessed by password. Physical files are not kept by this office and any hard copies of information are destroyed once your file has been finalised.

If we accept an application from you and it does not proceed, we are still required to retain this information for a period of 7 years. This information will be retained electronically and after 7 years will be deleted from our servers.

What are my rights?

If at any time you feel we do not hold current and correct information, you are able to contact us by phone or email to update this information.

If we contact you via any marketing activities you have the right to opt out.

You have the right to request a copy of your information at any time.

If you have a concern or complaint in relation to our compliance with the Australian Privacy Principles please contact us in writing via email or post.