

Privacy Statement



Price Financial Intelligence Pty Ltd are subject to the Financial Services legislative and regulatory requirements to obtain, hold and forward to relevant parties detailed personal and sensitive information about you.

The Privacy Act 1988 regulates the way in which personal and sensitive information can be collected, the accuracy of the information, how it is kept secure, and how it is used and disclosed. It also provides rights to individuals to access and correct the information.

What personal information we collect

In preparing and providing suitable personal advice, we must comply with the reasonable basis for advice rule (Regulatory Guide 175D). This means that we collect personal and sensitive information including contact details, employment, tax details, financial needs and objectives, current financial circumstances, investment preferences, health history, family history and any other information which may be relevant.

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How we collect and keep personal information

We collect personal information either directly or indirectly from third parties. Clients are also able to review personal and financial details by using free FACTS Online budgeting tools available on our website www.pricefinancial.com.au.

We are a paper-free organisation. All of our data are kept electronically and supported by daily backup and security procedures. We have strict guidelines to protect the personal information we hold against loss, unauthorised access, use, modification or disclosure and against other misuse.

How we use and disclose personal information

We do not use or disclose personal information collected by us for any purpose that is unrelated to our services and that you would not reasonably expect (except with your consent or compelled by law).

We have a duty to disclose personal information to third parties who are involved in the provision of our services. For example, insurance providers, accountants, lawyers or others involved in the process handling.

Your privacy is important to us. We have a duty to maintain the confidentiality of your personal and sensitive information. We take reasonable steps to ensure that your personal information is accurate, complete and current whenever we collect, use or disclose it.

How you can access your personal information

If you wish to access or make changes to you personal information, we will allow access or make the changes unless we consider that there is a sound reason under the Privacy Act, Freedom of Information Act 1982 or other relevant law to withhold the information.

Our Website

When individuals only browse our website www.pricefinancial.com.au, we do not collect their personal information.

As a paper-free organisation, our website allows individuals to upload and/or download documents using our Secure File Transfer facility. It also allows individuals to review their personal and financial details by using free FACTS Online budgeting tools. If the specific applications are utilised, the individual's visit logs and data will be recorded in our system.

Cookies

Our website does not use cookies.

How you can contact us

You can obtain further information in relation to this Privacy Statement, or provide any comments, by contacting us:

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