



PRIVACY STATEMENT

What does privacy mean for me?

Privacy is important to us and to our clients. The Privacy Act 1988 ensures that you, our client, understand what information we, your insurance broker/financial planner, hold about you, how we use that information and to whom we are likely to disclose that information. In addition it reinforces our commitment to keeping your information up to date and secure.

What types of personal information about me does Murdoch InsureInvest Pty Ltd hold?

As an insurance broker and provider of financial services we collect and hold information about you that is both relevant and necessary in order for us to provide you with those services. The types of information that we hold depend on the services provided and may include information about:

- your Identity
- financial position
- personal objectives
- health
- lifestyle
- membership of professional associations
- criminal records

We will always endeavour to obtain information about you directly from you.

How does Murdoch InsureInvest Pty Ltd use my personal information?

Our primary purpose in collecting personal information from you about you is to understand your needs and provide you:

- with insurance products
- services
- processing
- assessing claims
- financial advice
- develop your financial plan
- basis for product selection
- regular performance review

From time to time we may use your information in order to assess and bring to your attention other products and services that may be relevant to you.

What is a licensee?

A licensee is a holder of an Australian Financial Services License issued by ASIC.

Who does Murdoch InsureInvest Pty Ltd disclose my personal information to?

Your information is only disclosed to other parties as are necessary for us to provide our services to you. Other parties may include other insurers, insurance reference service, fund managers, life companies, other licensees and related parties. In addition, we will disclose your information where we are required to by law. In the event of a claim, we may disclose your information to and/or collect additional information about you from investing or legal advisors. We will not pass your information to other parties for any purposes other than those for which you have been informed.

How do I get access to the personal information Murdoch InsureInvest Pty Ltd holds about me?

If you wish to update or access information we hold about you, contact us. Upon receipt of your request we will endeavour to service your request fully and quickly as possible. In some circumstances access to your information or parts thereof may not be possible. If this is the case we will inform you as to why, and, where practical, make alternative arrangements. Depending on the requirements a fee may be charged to service the requests.

How do I make a complaint?

You may make a complaint at any time by writing to Murdoch InsureInvest Pty Ltd, we will seek to resolve it within 28 days. If this is not possible, you will be referred to Davis Murdoch or Mark Johnson. If you are not satisfied with David Murdoch or Mark Johnsons response to you complaint, you may contact:

Financial Ombudsman Service
Insurance Broking

GPO Box 3
Melbourne VIC 3001
Phone 1300 780 808
Fax (03) 9613 6399
Email info@fos.org.au
Website www.fos.org.au

Financial Ombudsman Service
Investments, Life Insurance &
Superannuation

GPO Box 3
Melbourne VIC 3001
Phone 1300 780 808
Fax (03) 9613 6399
Email info@fos.org.au
Website www.fos.org.au