Privacy Policy

We recognise that your privacy is important. We are committed to providing you with the highest levels of client service.

Our Commitment

We recognise that your privacy is important.

We are committed to providing you with the highest levels of client service. The Privacy Amendment (Enhancing Privacy Protection) Act 2012 (Act) sets out a number of Australian Privacy Principles (APPs). Our aim is to both support and ensure that we comply with these principles.

Use and Disclosure

We are subject to certain legislative and regulatory requirements which necessitate us obtaining and holding detailed information which personally identifies you and/or contains information or an opinion about you. In addition, our ability to provide you with comprehensive financial advice and services is dependent on us obtaining certain personal information about you, which may include:

- Your name, contact details, date of birth, tax file number
- Information regarding your dependents and family commitments
- Your occupation, and employment history
- Your financial needs and objectives
- Your assets, liabilities, income, expenses insurances, and social security entitlements
- Credit card and banking details

We will destroy or de-identify your personal information when it is no longer required.

Access and Correction

You have the right to access and request corrections to your personal information, subject to certain legal exceptions. We may not disclose confidential formulae or evaluative decision-making details but can provide results or explanations. We may charge a fee for searching and providing access to your information. If access is denied, we will explain the reason. We strive to maintain accurate and up-to-date personal information, but its accuracy largely depends on the information you provide. Please inform us of any errors in your data.

Privacy Complaints

To report a breach or potential breach of our privacy policy or the National Privacy Principles, contact us using the methods provided and direct your complaint to the Privacy Officer. We will address your complaint within 30 days and aim to resolve it to your satisfaction. If unsatisfied with our response, you can contact the Office of the Privacy Commissioner for further investigation.

Collection

Our main purposes for collecting personal information are to facilitate financial services advice and to update our records. At or before the time we collect personal information from you we will take reasonable steps to inform you why we are collecting that personal information, who else we might disclose that personal information to and what may happen if you do not provide personal information to us.

Data Security

We take measures to safeguard your information from unauthorised access, misuse, loss, or modification. Your data will be retained only as long as needed, except when required by law. We may share your personal information with third parties or external contractors, who must adhere to our privacy policy. Disclosure to third parties may occur if required or permitted by law, and you have the right to refuse such authorization. If we or your adviser plan to sell the business, your information may be disclosed to potential buyers for due diligence, under confidentiality agreements. If the sale occurs, your data may be transferred to the purchaser, and you will be informed of the transfer.

Use of Cookies

Our website utilises cookies to enhance your online experience by personalising content and saving time. Cookies are text files placed on your hard disk by a web server and are unique to each user, but they cannot run programs or transmit viruses. They help websites remember your information and preferences for easy access during subsequent visits. While most browsers automatically accept cookies, you can modify your settings to decline them; however, this may limit your ability to fully interact with the website's features.

Identifiers

In some circumstances we are required to collect unique identifiers, for example, your Medicare or tax file number. We will not use or disclose this information other than when required to do so by law or, or when consented to by you.

Anonymity

You may deal with us anonymously where it is lawful, practicable and reasonable to do so.

Sensitive Information

Without your consent, we will not collect sensitive information about you. Exceptions to this include where the information is required by law, or for the establishment, exercise, or defence of a legal claim.

Further information on privacy in Australia may be obtained by visiting the website of the Office of the Australian Information Commissioner at www.oaic.gov.au

As a financial services organisation we are subject to certain legislative and regulatory requirements which necessitate us to obtain personal information about you, including s961B of the Corporations Act.

We collect information about you for the purpose of reporting to AUSTRAC under the Anti-Money Laundering and Counter-Terrorism Financing Act 2006.

Contact Details

Privacy Officer

Address:
Level 5, 95 Pitt Street
Sydney, NSW 2000
Telephone: 02 9248 0422
Email: info@wtfglimited.com

SENTRY

Sentry Financial Services Pty Ltd ABN 30 113 531 034 AFSL 286786