PRIVACY STATEMENT

At Echelon Wealth Management Pty Ltd is committed to protecting your privacy in accordance with the Privacy Act 1998 (Cth). This document describes our current policies and practices in relation to the handling and use of personal information.

What information do we collect and how do we use it?

When we advise you about your financial affairs, we ask you for the information we need to understand your financial situation, needs and objectives. We provide any information that the fund managers or insurers whom we deal with on your behalf need to implement your investment and insurance strategies.

We also use your information to send you requested product information and promotional material and to enable us to manage your ongoing requirements, e.g. further investments, and our relationship with you, e.g. invoicing, client surveys etc.

We may occasionally notify you about new services and special offers, events or articles we think will be of interest to you. We may send you regular updates by email or by post on investment and insurance matters. If you would rather not receive this information, email or write to us.

We may use your information internally to help us improve our services and help resolve any problems.

What if you don't provide some information to us?

We can only fully advise you if we have all relevant information.

How do we hold and protect your information?

We strive to maintain the reliability, accuracy, completeness and currency of the personal information we hold and to protect its privacy and security. We keep personal information only for as long as is reasonably necessary for the purpose for which it was collected or to comply with any applicable legal or ethical reporting or document retention requirements.

We hold the information we collect from you both electronically and in hard copy

We ensure that your information is safe by maintaining a high level of security within our offices and building. To ensure that access to electronic data is only by authorised personnel we require regular renewal of access codes and maintain a sophisticated external access security level to reduce the chance of illegal external access to our data.

Do we disclose the information we collect to anyone?

We do not sell, trade, or rent your personal information to others.

We may need to provide your information to contractors who supply services to us, e.g. to handle mailings on our behalf or to other companies in the event of a corporate sale, merger, reorganisation, dissolution or similar event. However, we will do our best to ensure that they protect your information in the same way that we do.

We may provide your information to others if we are required to do so by law or under some, unusual other circumstances which the Privacy Act permits.

How can you check, update or change the information we are holding?

Upon receipt of your written request and enough information to allow us to identify the information, we will disclose to you the personal information we hold about you. We will also correct, amend or delete any personal information that we agree is inaccurate.

If you wish to access or correct your personal information, please write to Privacy Officer, Echelon Wealth Management Pty Ltd, PO Box 10491, Kalgoorlie WA 6433.

We do not charge for receiving a request for access to personal information or for complying with a correction request...

Your consent

By asking us to assist with your investment and insurance needs, you consent to the collection and use of the information you have provided to us for the purposes described above.

Tell us what you think

We welcome your questions and comments about privacy. If you have any concerns or complaints, please contact our Privacy Officer, on 08 9022 7722 or contactus@echelon.cc.