

Privacy Acknowledgment and Consent

In this Document 'We', 'us' and 'our' refer to: Matrix Planning Solutions Limited ("Matrix"), and its representatives. Matrix can be contacted by writing to Level 3, 31 Market Street, Sydney NSW 2000 or by telephone on (02) 8022 3500.

'You' and 'your' refer to: The person whose information we collect and hold to give advice about financial products and services.

Collection of Personal Information

We collect personal information about you so we can advise you about financial products and services, administer our relationship with you and to provide you with information on other services we provide. The personal information we collect from you will depend on the advice involved, but includes your name, address, contact details, business details, financial information, and in the case of an application for life insurance, medical and lifestyle information.

The law can also require us to collect personal information, e.g. Commonwealth legislation requires us to identify persons who open or operate accounts, or we may be required to collect your tax file number.

Other Members of Matrix Planning Solutions

We are permitted by the Privacy Act to disclose personal information (other than sensitive information) to our related bodies corporate. This enables Matrix to have an integrated view of its customers. Any related body corporate of ours to which personal information is properly disclosed, will also be bound by the Privacy Act in relation to the use and disclosure of such information.

Other Disclosures

Personal information may be disclosed to:

- If you have life insurance: the insurer, claims investigators, medical practitioners, reinsurers, and insurance reference agencies. If sensitive information about you (including health information) is collected for the purpose of an application for life insurance, that sensitive information will only be used for that purpose or with your consent;
- If you have superannuation or managed investments: external product providers into which you might direct some of your investment, other product providers to which your investment might be transferred, fund administrators and fund trustees;
- Austrack the government agency who oversees Anti Money Laundering and Counter Terrorism. Before we arrange products or services we are required to validate client identity. We will request and copy some personal documents only for that purpose. Also we are required to provide details of certain transactions and entities where we hold reasonable suspicion of suspect nature.

In all circumstances where we contract with others to provide services to us, and these contractors have access to your personal information, confidentiality agreements will apply. Personal information may only be used by our contractors for our purposes.

We may be allowed or obliged to disclose information by law. e.g. under Court Orders or Statutory Notices pursuant to taxation or social security laws.

You Need to Provide Us With Accurate and Relevant Information

If you provide us with incomplete or inaccurate information, the advice we give you may be incomplete or inappropriate or we may not be able to arrange the products or services you are seeking.

Sending of Personal Information Overseas

We may send information overseas if we outsource functions using overseas agents or contractors.

Access

You may (subject to permitted exceptions) access your information by contacting the Compliance Manager, Matrix Planning Solutions Limited, Level 3, 31 Market Street, Sydney NSW 2000 in writing. We may charge you for providing access.

More Information

For more information about our policies on privacy please read our Privacy Statement, which can be obtained upon request.

Privacy Acknowledgment and Consent

Your Acknowledgment and Consent

Your signature below indicates that you acknowledge and consent to the such use and disclosure of your personal information as indicated above.

I acknowledge and consent to the above.

Client Name:

Client Signature (1):

Date

Client Name:

Client Signature (2):

Date