

Privacy Policy

Halifax Advisory respects the value of your personal information and are committed to its protection at all times. This policy outlines how we collect, manage and use your Personal Information.

In developing this policy we have been guided by the Australian Privacy Principles (APPs) contained in the Privacy Act 1988 (Cth) (the Privacy Act).

What is Personal Information and why do we collect it?

Personal Information is information or an opinion that identifies an individual. The types of personal information we may collect includes;

- Your name, date of birth, and address including email address;
- Your Tax File Number;
- Your phone number and mobile phone number;
- Financial records;
- Australian Business Number;
- credit card or other bank details;
- shareholdings, directorships or other investments;
- Additional advice from you regarding family relationships and other business-related connections.

This Personal Information is obtained in many ways including by telephone and facsimile, by email, via our website www.halifaxadvisory.com.au, and from third parties. We don't guarantee website links or policy of authorised third parties.

We collect your Personal Information for the primary purpose of providing our services to you, providing information to our clients and marketing. We may also use your Personal Information for secondary purposes closely related to the primary purpose, in circumstances where you would reasonably expect such use or disclosure. You may unsubscribe from our mailing/marketing lists at any time by contacting us in writing.

When we collect Personal Information we will, where appropriate and where possible, explain to you why we are collecting the information and how we plan to use it.

Sensitive Information

Sensitive information is defined in the Privacy Act to include information or opinion about such things as an individual's racial or ethnic origin, political opinions, membership of a political association, religious or philosophical beliefs, membership of a trade union or other professional body, criminal record or health information.

As a general rule, we do not collect sensitive information. However, if we do, it will usually be for the purposes of providing our services and we will seek your consent to collect it.

Third Parties

Where reasonable and practicable to do so, we will collect your Personal Information only from you. However, in some circumstances we may be provided with information by third parties. In such a case we will take reasonable steps to ensure that you are made aware of the information provided to us by the third party.

Disclosure of Personal Information

Your Personal Information may be disclosed in a number of circumstances including the following:

- Third parties where you consent to the use or disclosure; and
- Where required or authorised by law.

Security of Personal Information

Your Personal Information is stored in a manner that reasonably protects it from misuse and loss and from unauthorized access, modification or disclosure.

When your Personal Information is no longer needed for the purpose for which it was obtained, we will take reasonable steps to destroy or permanently de-identify your Personal Information. However, most of the Personal Information is or will be stored in client files which will be kept by us for a minimum of 7 years.

Access to your Personal Information

You may access the Personal Information we hold about you and to update and/or correct it, subject to certain exceptions. If you wish to access your Personal Information, please contact us in writing.

Halifax Advisory will not charge any fee for your access request, but may charge an administrative fee for providing a copy of your Personal Information.

In order to protect your Personal Information we may require identification from you before releasing the requested information.

Maintaining the Quality of your Personal Information

It is an important to us that your Personal Information is up to date. We will take reasonable steps to make sure that your Personal Information is accurate, complete and up-to-date. If you find that the information we have is not up to date or is inaccurate, please advise us as soon as practicable so we can update our records and ensure we can continue to provide quality services to you.

Policy Updates

This Policy may change from time to time and is available on our website.



Privacy Policy Complaints and Enquiries

If you have any queries or complaints about our Privacy Policy please contact us at:

Mobile: 0417 772 569

Email: paul@halifaxadvisory.com.au