

PRIVACY POLICY

At Gillespie Finance Directions Pty Ltd we are committed to protecting your privacy in accordance with the Privacy Act 1998 (Cth). Gillespie Wealth Management is our business or “trading” name and it is licensed under Gillespie Finance Directions Pty Ltd (AFSL: 478547). This Privacy Policy describes our current policies and practices in relation to the collection, handling, use and disclosure of personal information. It also deals with how you can access the personal information we hold about you, ask us to correct it, or make a privacy related complaint.

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

We will ask you for personal information when you become a client of Gillespie Finance Directions Pty Ltd. This may include a broad range of information ranging from your name, address, contact details and date of birth to other information about your income and affairs including your employment situation.

We use the information you provide to advise and assist with your taxation, finance, financial planning or risk needs.

We also use your information to send you requested product information and to enable us to manage your ongoing relationship with us. We may do so by mail or electronically unless you tell us that you do not wish to receive electronic communications.

From time to time, we will use your contact details to send you direct marketing communications including offers, updates and newsletters that are relevant to the services we provide. We always give you the option of electing not to receive these communications in the future. You can unsubscribe by notifying us and we will no longer send this information to you.

We may also 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?

If you don't provide us with full information, we can't properly advise or assist you with your need for our service whether this is taxation, finance, financial planning or risk.

How do we hold and protect your information?

We strive to maintain the relevance, 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 in secure lockable file cabinets located in our office as well as on our secure and protected electronic server. In some cases, your file is archived and sent to an external data storage provider for a period of time. We only use storage providers located in Australia who are also regulated by the Privacy Act.



We ensure that your information is safe by having security card access to our administration department, security filing cabinets, encryption on all emails and website data and through firewalls and anti-virus protection systems on our electronic server. All office computers have high security passwords. We maintain physical security over our paper and electronic data and premises by using locks and security systems.

Will we disclose the information we collect to anyone?

We do not sell, trade, or rent your personal information to others or disclose it to overseas recipients.

We will provide your information to the companies with whom you choose to deal (and their representatives). We will input your information into our online CRM system known as Xplan. This information is for administration and supervision activities and we may need to provide your information to contractors who supply services to us e.g. compliance auditors, external mailing houses, external data storage providers or to other companies in the event of a corporate sale, merger, reorganisation, dissolution or similar event. However, we will take reasonable steps to ensure that they protect your information as required under the Privacy Act.

We may also provide your information to others if;

1. we are required to do so by law;
2. you consent to the disclosure; or
3. under some other unusual circumstance 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 the Privacy Officer at admin@gillespiegroup.com.au or contact the office on 02 6260 4994.

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

Your consent

By engaging the services of Gillespie Wealth Management and its entities, 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 the Privacy Officer on either 02 6260 4994 or at admin@gillespiegroup.com.au.