



the Pentad Group

Lifestyle through strategic financial management

THE PENTAD GROUP PTY LTD  
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PRIVACY

# Statement

## **What does the Privacy Act legislation mean to me?**

Laws protect the privacy of your personal information held by certain private sector organisations. These laws govern The Pentad Group Pty Ltd ("Pentad"). To enable the fulfilment of Australian Financial Services Licence obligations and the provision of services to you, Pentad will need to collect personal information from you. Pentad must, as a result, provide you with the following information in respect of its handling of your personal information.

## **What is my personal information used for?**

Your personal information is used to:

- assist your adviser in providing advice to you
- administer and manage your investments
- facilitate Pentad internal business operations, including fulfilment of any legal requirements
- analyse products and customer needs and develop new services
- carry out confidential maintenance and testing of computer systems.

## **Who else will receive access to my personal information?**

We may disclose your personal information (as necessary) on a confidential basis to industry bodies, our agents, contractors or third party service providers that provide financial, administrative or other services for the purposes of the Pentad business or your investments where the law requires us to do so or if you consent.

From time to time, your adviser may provide you with marketing material prepared by a member of Pentad. If you do not wish to receive such material at any time in the future, please contact your adviser.

## **How do I access information that you hold about me?**

You are entitled at any time to request access to personal information held by your adviser or Pentad about you, and can ask us to correct this information where you believe it is incorrect or out-of-date. No fee will be charged for an access request but we may charge you the reasonable costs of giving you any information you have requested. An access request can be directed through your adviser.

## **Where and when can I get more information about the Privacy Act with respect to my investments?**

Our Privacy Brochure sets out in detail our policies on the management of personal information. You can obtain a copy of this brochure free of charge from your adviser at any time.