

Privacy Policy

Foundation Advisory Pty Ltd understand that you value your privacy and wish to have your personal information kept secure. As an Accounting Firm, Foundation Advisory Pty Ltd collects and holds a large range of highly sensitive personal and commercial information. For these reasons, the firm places a high priority on the security of information held by our firm. We have developed this policy to inform you how we manage your personal information to maintain its integrity and security.

We are bound by the Privacy Act 1988 and must comply with the National Privacy Principles. You can find more information about the Privacy Act and the National Privacy Principles on the Federal Privacy Commissioner's web-site at www.privacy.gov.au.

Whilst we believe in keeping your personal information highly secure, we also believe that you have the right to be informed about how we deal with that information so if on reading this policy you are unclear on any of the matters or simply want more information, please do not hesitate to contact us on the telephone number or address provided below.

Collecting personal information

We aim to collect only personal information which is relevant and necessary to providing the service you have requested from us. If you do not provide us with the personal information we request of you, we will be unable to provide our services with efficiency and accuracy. Further, it is not practicable for us to provide our services to people anonymously.

In general you can assume that we have collected and hold the following information:

Name and contact details, Date of birth, Tax file number, ACN, ABN, ARBN, Bank account details, details of your income, expenses, assets and liabilities.

Naturally we collect and hold a broad range of your personal entity information gathered during the course of providing our services. However as stated above, we strive to ensure that we collect and hold only that personal information which is relevant and necessary to advise on the specific matters you have requested us to address.

Purposes of collection

We primarily collect information to allow us to provide the services you have requested.

We may also use the information to: send newsletters concerning various financial matters which we believe would be of interest to you; invite you to seminars or events that we conduct or host; inform you of developments at the firm and other services that we can provide; and to assist us manage our practice.

We will not sell, rent or trade any of your personal information to any person.

We will not disclose information about you unless the disclosure: is required by law; is authorised by law; or you have consented to our disclosing the information about you.

Third parties

Information may be disclosed to the following third parties: Australian Taxation Office, APRA, Centrelink, your solicitors, your bank and financial institutions, your investment broker any related corporations or affiliate practices and any other organisations which you usually disclose information of this kind. Foundation Advisory Pty Ltd will request your permission before disclosing any third party information.

The following third parties may have access to personal information at times: IT service providers, including software developers may have access when providing support. However it is our practice for them to work under our supervision at all times.

Personal information quality

We aim to ensure that your personal information is accurate, complete and up to date. To assist us in this, you need to provide true, accurate, current and complete information about yourself as requested and maintain and properly update the information to keep it true, accurate, current and complete.

If you find that the information is inaccurate or incomplete, please contact us and we will use all reasonable efforts to correct the information.

Securing your personal information

We are committed to maintaining the security and confidentiality of the data you provide to us and we will take all reasonable precautions to protect your personal information from unauthorised disclosure, use or alteration.

We have the following security systems in place to protect your information: all computers linked to our internet are password protected and virus protected; access to our office building is restricted outside working hours.

Accessing your personal information

You can ask us to provide you with access to all your personal information that we hold about you. If we are able to, we will give you that access. In some cases, we may charge you a fee for access but in no cases will we charge you a fee for applying for access.

If we refuse your request for access, we will give you the reason for that refusal.

We are not required to provide access where the information relates to existing or anticipated legal proceedings between ourselves and an individual, and the information would not be accessible by the process of discovery in those proceedings; where denying access is required or authorised by law; or providing access would be unlawful.

Information the law requires us to collect

We are not required to collect any information by law.

Changes to this statement

This Privacy Policy is not a static document; we may make changes to this Privacy Policy from time to time for any reason. We will provide an updated version of this policy on request.

Contacting us

If you would like further information regarding this privacy statement or if you think we have breached any aspect of this Privacy Policy please contact Robert Paganin at:

Telephone: 0407 300 089

Post: Foundation Advisory Pty Ltd
PO Box 1333, BLACKBURN NORTH VIC 3130

Disclaimer

The material contained in this web site is of the nature of general comment only, and neither purports, nor is it intended to be advice on any particular matter.

No person should act on the basis of any information contained herein without considering, and if necessary, taking appropriate professional advice in relation to their own particular circumstances.

No responsibility is therefore accepted for any error or omission, or advice expressed herein, nor for any loss occasioned therefrom.

Please contact us before making any final decisions.

For more information on Foundation Advisory Pty Ltd please contact telephone 0407 300 089.