

Privacy Policy

22 July 2010

In this Privacy Policy:

“We”, “our”, and “us” means Entello Group, Entello Pty Ltd and the National Institute of Financial Studies Pty Ltd (NIFS).

National Privacy Principles:

Entello Group, Entello Pty Ltd and the National Institute of Financial Studies Pty Ltd are bound by the National Privacy Principles.

What type of information does Entello Group hold?

The type of information we hold varies depending on the type of product or service we provide to you. For example, Entello will hold different information about you if you have a financial plan prepared than we will hold if you have a loan application prepared or are attending courses offered by the NIFS.

In general, Entello Group may hold the following personal information:

- Name and address;
- Date of birth; and
- Contact details, which may include your telephone number.

Entello Group may also hold the following information about you:

- Gender;
- Occupation;
- Details of property you own;
- Tax file number, where you have given it to us;
- Health information;
- Financial situation and opinions, for example where we have prepared a financial plan for you;
- Insurance claim information, where this is relevant;
- Employer's name and address;
- Salary;
- Names and addresses of your dependants or beneficiaries;
- Other relevant information that you have given us.

How does Entello Group collect this information?

Where it is practical, we will collect personal information about you directly from you. However, in some circumstances, for example, where we are giving financial advice to your spouse, we may collect personal information about you indirectly.

How does Entello Group use this information?

We use this information to provide you with Entello or NIFS products or services.

The types of products and services Entello or NIFS provides are, in general:

- Financial advice and services
- Buyers Advocacy services
- Share Portfolio services
- Courses and Training

We may also use the information to send you material about other Entello Group products or services. If you do not want to receive this type of material, tell us and we will stop. Our contact details are set out below.

Does Entello Group usually share information with other companies?

To provide you with Entello Groups products and services, Entello and NIFS share information with its internal and external service providers. These may include:

- Lending Institutions;
- Valuers;
- Lenders Mortgage Insurers;
- Statement Printing Houses;
- Real Estate Offices, and
- Advisers.

This information is shared only when it is required to complete business activities. Entello Group also shares information as required by law e.g. Australian Tax Office, Centrelink, or under subpoena to a Court of Law.

WE DO NOT SELL MAILING LISTS.

Do I need to give consent for this information to be used?

In the majority of circumstances, Entello Group will require your specific consent before we collect, use or disclose personal information. Consent will be obtained in writing however there may be some situations where your verbal consent is accepted.

What if I do not provide personal information?

We will only collect personal information that is practically necessary for us to provide you with Entello Group products and services. If you choose not to give us relevant personal information, then this may affect the standard of service that we are able to provide. In some cases, this may mean that we cannot provide you with Entello Group products and services.

How does Entello Group handle a request for access to personal information?

Under the National Privacy Principles you are generally entitled to access the information we hold about you. Where you are entitled to access, the time we require to give you access will depend on the type of information requested. If we can, we will answer your question immediately. We will also try to answer you in the same way that you ask, for example, if you telephone to ask for the information we will, if practicable, give you that information over the telephone. We will generally respond to a written request in writing.

Sometimes, we will ask that you put your request in writing, for example, where you want copies of material or access to older information or files which are not current or it is necessary for us to retain a record of your request.

To protect your privacy and that of other people we may also ask you to satisfy us as to your identity.

In some circumstances, we may charge a fee for giving you access, which will vary but will be based on our costs (internal and external) in locating the information and providing the form of access you have requested. If we propose to charge a fee for giving access, we will give you an estimate of the fee so you can confirm that you still want us to give you access to the information. We do not impose any charge for lodging a request for access.

If we are entitled under the National Privacy Principles to refuse to give you access, we will tell you and provide reasons.

What if some of the information Entello Group holds is wrong?

Please tell us. We want our records to be accurate, complete and up to date. Unless we disagree with you about the accuracy, completeness or currency of a record, we will take steps to correct it, (or make alternative arrangements to update our records). If we disagree with you, we will give you our reasons.

How does Entello Group ensure the security of my personal information?

Security is of the utmost importance to Entello Group. We employ the following means to ensure that personal information is protected at all times from unauthorised access, loss, modification, misuse or disclosure.

- Security key access to client file room
- Username and Password required for access to the database
- Restricted access to databases containing personal information
- Defined levels of access to databases containing personal information
- All staff are required to sign confidentiality agreements as a condition of employment
- Backup and Disaster recovery plans to handle major business interruptions
- Regular maintenance and updating of technology products and security systems to prevent unauthorised computer access.

When information is no longer required, we ensure that it is deleted from our systems, destroyed in a secure manner, or permanently de-identified.

How do I make further enquiries or complain about a breach of privacy?

If you require more information about the way Entello Group manages personal information or wish to make a complaint about a breach of your privacy, please contact Entello Group (see below for details) and ask to have your concern passed to the CEO as a matter of priority. The CEO will contact you as soon as possible.

How can I contact Entello Group?

Call Us: (07) 3264 1122

Email Us: admin@entello.com.au

Write to Us: The Privacy Officer
Entello Pty Ltd
PO Box 286
Albany Creek QLD 4035

Changes to this Privacy Policy:

We reserve the right to review and amend this Privacy Policy any time. For a current version of our Privacy Policy please do not hesitate to contact us.