



Privacy Policy

Reed Paraplanning abides by the Australian Privacy Principles (APP) outlined in the Privacy Act 1988.

Reed Paraplanning prepares financial advice documents for the needs of financial advisers in Australia.

The management of the company issues this policy in order to protect client financial and account information, other confidential information of clients, employees and other stakeholders, as well as to enable the continuous availability of assets for secure and efficient operation.

Customer care

In order to confirm the trust of our clients, the services we provide are undertaken in a way which includes the safeguarding of data and confidentiality of information.

Protecting information assets

This policy provides the framework for setting objectives of information security, protection of information assets and ensuring the continuity of critical business operations.

Employees are expected to use information assets for legitimate business purposes, with protection and preservation of confidentiality and integrity.

Compliance

Reed Paraplanning conducts its business activities with integrity and compliance with applicable laws and regulations relating to the operation of the company, and in particular

with regards to the protection of personal and financial data.

How we handle personal information

1. Privacy is important to us

Any information collected by Reed Paraplanning that is not available to the public (e.g. available on the internet) is treated as confidential information.

2. Information we collect

We collect information from financial advisers regarding their business, strategies and products they recommend. We also collect personal and sensitive information about individuals (and/or entities) who are clients of financial advisers. All such information is not passed on to any third parties and is used exclusively for the purpose of the agreed upon work performed by Reed Paraplanning.

3. How do we use your information?

We collect, use and exchange your information so that we can:

- Prepare accurate and appropriate Statement of Advice (SoA) and/or Record of Advice (RoA) documents.
- Prepare accurate and appropriate financial modelling.
- Complete data entry, research or other administrative support.

We take all reasonable steps to protect your information from misuse, loss, unauthorised access, modification or improper disclosure. We do not store hard-copy records of any client information on company premises as all information will be accessed electronically.

We may utilise third party cloud-based services to store company specific information such as Adviser preferences, model portfolios or risk profile benchmarks.

4. Keeping your information secure

Our security safeguards include:

- Taking precautions with third parties – We utilise the services of DropBox who comply with ISO 27017. ISO 27017 is an international standard for cloud security that provides guidelines for security controls applicable to the provision and use of cloud services.
- System security – We have firewalls and virus scanning tools to protect against unauthorised persons and viruses accessing our software and/or systems.
- Destroying electronic data when no longer required – Where practical, we keep information only for as long as required.
- Staff education – We train and remind our staff of their obligations with regard to your information.

Making a privacy complaint

If you have a concern about your privacy, you have the right to make a complaint.

If you feel your complaint has not been satisfactorily addressed in the first instance, or that it is taking too long to resolve, you can ask for your concerns to be escalated to the Reed Paraplanning Privacy Officer.

Contact details are as follows:

By email: contact@reedparaplanning.com

In writing: Reed Paraplanning– Privacy Officer

63 Morehead Avenue

NORMAN PARK QLD 4170