



## **Queensland Leaders Privacy Policy**

### **In this document:**

- Queensland Leaders will be referred to as 'QL' or 'we' or 'us' or 'our'.
- Personal information means information or an opinion about you where it is possible to ascertain your identity from that information or opinion.

### **Our Privacy Commitment**

Australian law protects the privacy of your personal information. This policy briefly outlines how QL collects, maintains, uses and discloses personal information about you.

Our Privacy Policy sets out our policies for the management of personal information.

We will manage your personal information in accordance with the law and the National Privacy Principles (subject to any other over-riding provisions of law) and as specified in our Privacy Policy. Our Privacy Policy may change from time to time.

*This Privacy Policy is to be read subject to any over-riding provisions of law or contract.*

### **Where we collect the information from**

In most instances personal information about you will be collected directly from you in either an application form or documents completed by you, correspondence from you to us, during an interview or from telephone contact.

We may also obtain personal and other information from some third parties such as accountants and any other organisations that referred you to us.

When we obtain personal and other information from third parties whom we are referred to by you, we will assume and you will ensure that you have made that third party aware of your referral and the purposes involved in the collection, use and disclosure of the relevant personal or other information.

Personal information about you may also be collected from one of our websites but only if you voluntarily provide us with your details (e.g. if you email your contact details)

QL can be contacted at:

Ground Floor, 545 Queen Street  
Millhouse IAG Building  
BRISBANE QLD 4000  
Telephone: (07) 3230 8087  
Facsimile: (07) 3230 8001  
[info@queenslandleaders.com.au](mailto:info@queenslandleaders.com.au)

We may also obtain personal and other information from some third parties such as accountants and other organisations who have referred you to us.

When we obtain personal and other information from third parties to whom we have been referred by you, we will assume and you will ensure that you have made that third party aware of your referral and the purposes involved in the collection, use and disclosure of the relevant personal or other information.

- Your name, address, contact details and date of birth;
- Your email address;
- Details of your annual income, expenditure and employment;
- Details of your assets and liabilities;
- Details of any securities or investments you hold;
- Details of your associated bank accounts;
- Details of specific transactions;
- Details of your investment or objectives and risk profile.

We will assume you consent to the collection of your personal information in the manner specified in this Privacy Policy until you tell us to the contrary.

#### **Access to Information**

You are entitled to at any time to request access to personal information held by us about you and to ask us to correct this information where you believe (and in some circumstances prove) it is incorrect or out of date.

To do this please contact us using the contact details above and you will be advised of our procedures for accessing and correcting personal information.

QL will not charge you for lodging a request to access your personal information but may charge you for QL's reasonable costs of making the personal information available to you. In limited circumstances access may be denied where required or permitted by law. If we decided not to provide you with access to your personal information we will give you our reasons for our decision

#### **Complaints**

If you have a complaint about our treatment of your privacy, please contact our privacy officer using the contact details above. Our privacy officer will investigate your complaint and endeavour to resolve any issue to your satisfaction.

#### **Use and disclosure of information**

We will only use or disclose the personal information collected about you for the purposes for which it was collected (including one or more of those purposes specified in the Privacy Policy) or related purposes which you would reasonably expect us to use or disclose the personal information for, or where you have consented to us using or disclosing the personal information.

#### **We use your personal information for the following purposes:**

- Enable us to assess any request from you for business advice;
- Send information to you;
- Respond to any specific requests you may contact us about;
- Help us to conduct assessments on your behalf;
- Notify you of any services that may be of interest to you;
- Keep you informed on matters that may affect or be related to you;
- Update your personal files;
- Enable us to meet our obligations under certain laws;
- To assist in determining your objectives;
- To provide you with regular reviews and keep you informed;
- Any purpose for which the information is requested and any directly related purpose;
- Developing, improving and marketing our products and service

#### **Disclosing your Personal Information**

QL may disclose your personal information to the following organisations for the purposes specified:

- To related companies of QL for the purpose of marketing new opportunities to you;
- To potential investors in private & public equity markets;
- To our bank;
- To outsourcing organisations contracted by QL to provide administrative functions on our behalf, for example, IT contractors providing maintenance of our data systems.

In addition QL may disclose personal information it holds about you in the following circumstances:

- You consent to the disclosure;
- If the disclosure is required by law.

From the information we obtain from you we use some of it to keep you informed of other products, services or opportunities that may be of interest to you or help you achieve your investment objectives. Please contact us using the contact detail above if you do not want your personal information to be used for these purposes. We will not disclose information about you to third parties for direct marketing purposes.

#### Email address

Unless otherwise specified in this Privacy Policy if you provide us with your email address during a visit to one of our web sites it will only be used for the purpose for which you provided it to us. It will not be added to a mailing list unless the mailing list is related to the purpose for which you provided your email address to us. We may use your email address, for example, to provide you with information about a particular service or product or to respond to a message you have sent us.

#### Consequence of not providing personal information

You may choose not to give QL your personal information. Depending on the type of product or service you request the consequence set out below may apply if you do not give some or all of your personal information to us:

- QL will not be able to provide you with its services or products

#### Security and Retention Policies

QL is committed to ensuring the security of personal information that we hold about you. We take reasonable steps to ensure the personal information we hold about you is stored securely, whether in a physical or electronic form. If you use the Internet to communicate with us you should be aware that there are inherent risks in transmitting personal information over the Internet. QL does not have control over the transfer of personal information over the internet and we cannot guarantee its security. Any personal information we no longer require may also be destroyed. An exception to this may be where the records are required to be retained by law.

#### Updating our Privacy Policy

We may amend this Privacy Policy at any time and from time to time. If we do so, we may post the amended Privacy Policy on our website (mentioned above) so that you can be aware of how we manage your personal information.