

OUR PRIVACY POLICY



This Privacy Policy sets out the information handling practices of Hotchkin Hughes Pty Ltd (HH). As you read this document please note that "HH" "we", "our", and "us" means Hotchkin Hughes Pty Ltd.

HH is a registered Tax Agent in Public Practice specialising in taxation advice, and business advice.

We respect your privacy.

We are bound by, and committed to supporting the Privacy Act.

Accordingly, we have developed this Privacy Policy to outline our approach to handling your personal information and the way we collect, hold, verify, access, use and disclose information about you.

Key aspects of our approach are outlined below and if you need more information or clarification, please ask us.

Collecting information

The type of information we collect and hold about you varies depending on the type of product or service you require. The personal information we hold about you may include:

- Your name, address and contact details
- Your date of birth, age and retirement plans; and,
- Your financial needs, objectives and circumstances and information
- Tax File Numbers
- Tax Returns and Financial Reports

In most circumstances, the information that we hold about you has been provided to us by you.

How we use your personal information

We use this information to provide you with the services you have requested, strategies

and recommendations consistent with your financial needs, objectives and personal circumstances and tax planning

Disclosure of your personal information

We will only disclose information to external organisations who assist us/you in administering your investments, business and taxation or who provide you with products and services. Depending on the type of services required, this may include administrators, solicitors, Financial Planners, banks and finance brokers, fund managers and/or insurance companies. We will only provide information to organisations with a similar commitment to respecting your privacy and we will only provide them with the information they need to deliver the relevant services and only after first receiving your approval.

There are other circumstances under which we may disclose your personal information, for example when disclosure is required or authorised by law (for example, disclosed to a government agency or where disclosure is necessary to protect our interests).

We will also disclose your personal information if you instruct us to do so.

Security of your personal information

We are committed to protecting information held from unauthorised access, modification or disclosure and we have taken reasonable steps to secure your personal information.

By authorising us to communicate with you by email, you're authorising us to act on any instructions without enquiring as to the identity of the sender. If your instructions are ambiguous, incomplete or unclear we are under no obligation to act on your instructions. We will not be liable for any loss or damage which you may suffer or incur as a result of us following your email instructions.

When we correspond with you by email, our messages are not encrypted and may potentially be accessed by unauthorised persons.

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Accessing and correcting your personal information

Under the Privacy Principles you are generally entitled to access the information we hold about you. In normal circumstances we will give you full access to this information although the time we require to give you access will depend on the type of information requested.

However, there may be reasons to deny access, such as when your request may unreasonably impact upon another person's right to privacy. If your access is denied, we will provide you with the reasons.

Where access is provided, we will require you to provide evidence of your identity and we may charge a fee based on the time spent retrieving, collating and producing the information. This fee will be disclosed to you at the time of your request.

Updating your personal information

We rely on the information you provide to us and we take all reasonable steps to ensure that all information we hold is as accurate as possible.

If you become aware, or believe, that any personal information which we hold about you is inaccurate, incomplete or outdated, you must contact us and ask for your personal information to be corrected. Unless we disagree with you about the accuracy, currency or completeness of a record, we will generally make the correction on request, (or suggest alternative arrangements for updating our records).

If we disagree with you, we will give you our reasons and record your objections on your file.

Will this privacy policy change?

From time to time, it may be necessary for us to review and revise the policy. We reserve the right to change the policy at any time and may notify you of the change in writing.

What to do if you have a question or complaint?

If you require more information about the way we manage information or wish to make a complaint about a breach of your privacy, you should contact us directly and your complaint will be considered and responded to within 10 business days.

If you are not satisfied with our response to your complaint, you can telephone the Commonwealth Privacy Commissioner's hotline on 1300 363 992.



Contact Details:

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