

**Boland Investments Pty Ltd trading as TGS Partners Wealth  
Management**  
ABN: 35 511 311 807

## **Privacy Policy**

### **Background**

The Privacy Act 1998 (Cth) affecting the Private Sector came into effect on 21 December 2001. We are required under the Corporations Act, certain regulations issued by the Australian Securities and Investments Commission, and the Rules of Professional Conduct of the Financial Planning Association of Australia (FPA).

The Act implements the National Privacy Principles (NPP), which set out how private sector organisations should collect, use, disclose and store personal information, as well as the right of individuals to access and correct the information.

### **We respect your privacy**

Boland Investments Pty Ltd trading as TGS Partners Wealth Management ("TGS Wealth") has created this Privacy Policy and Collection Statement (together referred to as "this Privacy Policy") in order to demonstrate its firm commitment to privacy. TGS Wealth will comply with the provisions of the Privacy Act 1988 at all times. Please note that if at any time TGS Wealth is required by law to release information you or your organisation, TGS Wealth must cooperate fully.

### **What sort of information does TGS Wealth collect?**

TGS Wealth collects personal information (such as contact details) relating to shareholders, contractors, job applicants, employees, and individuals who deal with TGS Wealth in the course of TGS Wealth's activities.

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

TGS Wealth uses personal information for the purpose of providing the following services:

- Preparation of your Statement of Advice
- The provision of financial planning and risk insurance advice to you
- Making securities, investment and insurance recommendations
- Reviewing your investments and insurances
- Other activities as directed by you

Information about clients is used to access applications for shares, keep proper company records, and administer the company. Information about contractors, job applicants, and

employees, is collected to facilitate normal employment functions. Information about individuals involved with TGS Wealth's activities is collected by TGS Wealth in order to facilitate the relevant activities.

## **Collecting personal information**

Where possible, TGS Wealth collects personal information about individuals directly from the relevant individuals. If practicable, TGS Wealth provides disclosures as required under the Privacy Act prior to, or at, time of collection. Where this is not practicable, the disclosures are provided as soon as practicable after the time of collection.

Where TGS Wealth collects personal information about individuals from sources other than the individual themselves (eg via TGS Wealth's outsourced service providers), TGS Wealth takes reasonable steps to ensure that the individual has been made aware of matters covered by disclosures required under the Privacy Act.

TGS Wealth informs individuals of the types of parties to whom personal information is disclosed. These include providers of outsourced services, law enforcement bodies, professional advisers, and financial institutions involved in processing transactions.

TGS Wealth ensures that providers of outsourced services are subject to contractual provisions for the protection of personal information disclosed to them by TGS Wealth.

## **Security for your personal information**

We take all reasonable steps to protect the security of the personal information that we hold. This includes appropriate measures to protect electronic materials and materials stored and generated in hard copy. You should be aware that the Internet is not a secure environment. If you use the Internet to send us information, including your e-mail address, it is sent at your own risk.

## **Correcting and updating your profile**

We will take all reasonable steps to ensure that your personal information which we collect, use or disclose is accurate, complete and up-to-date. We will correct some of the personal information (such as contact details) that we hold about you by requesting us to do so via e-mail or in writing. If you wish to access the information we hold about you, please send an e-mail us and we will respond to you within 30 days. A handling fee may be payable so that we can obtain the information you require. You can also request that incorrect information about you be corrected or deleted.

## **Updating our privacy statement**

TGS Wealth will update this privacy policy as required. If it is changed, the changes will be posted on our website so that you are always aware of the sort of information collected, how the information may be used, and under what circumstances it may be disclosed by TGS Wealth.