

taggart

Privacy Policy Statement

Taggart Nominees Pty Ltd is an Australian Financial Services Licensee (no 234973), and is authorised to provide Financial Planning services. The Taggart Group Pty Ltd is also an Australian Financial Services Licensee, (no 245533), and is authorised to provide General Insurance financial services.

Taggart Nominees Pty Ltd & The Taggart Group Pty Ltd respects your privacy and is committed to protecting your privacy. This statement explains how we collect your personal information and how we maintain, use and disclose this information. It also provides some detail about your privacy rights along with our general rights and obligations and our policy in relation to the personal information we keep on record.

What information do we collect?

We may collect and hold personal information about you in the normal course of our activities. Your personal information is collected for the purpose of providing you with the service or services that you have requested. The nature of the personal information we collect from you will depend on what you have provided us with. Generally, the type of personal information we collect includes your name, your address, date of birth, marital status, your partner's personal information, income and other financial details, employment details and credit history.

Generally we would collect most of your personal information directly from you. We will only collect personal information from you that is necessary for one or more of our functions and activities. You may authorise us to collect information from a third party, such as your accountant.

At or before we collect personal information from you we will take reasonable steps to inform you why we are collecting that personal information, who else we might disclose that personal information to and what will happen if you do not provide personal information to us.

Wherever it is lawful and practicable we will give you the option of not identifying yourself or not providing personal information when dealing with us. However, failure to provide full and complete information we request may mean that we are unable to provide you with the services you have requested completely and properly.

Sensitive Information:

In certain circumstances, such as completing an application for life insurance cover, we may request sensitive information such as health details from you. We will ask you to consent to our proposed uses of the information. We will only use the information you provide for the purpose of providing the service(s) you have requested.

Marketing Opt-Out:

From time to time we may also use your contact details for marketing communication activities. If you do not want the benefit of receiving information, special offers or exclusive opportunities about products and services which we think may be of interest or value to you, please tell us. You can do this at any time by writing to us or by phoning our office.

Personal Identifiers:

We will not adopt as our own, any identifiers you may provide such as tax file numbers, Centrelink numbers etc.

Accuracy:

We will try to ensure that all the information we hold about you which we collect, use or disclose is accurate, completed and up to date. To enable us to keep our records properly, please notify us if you believe that any information we hold about you is inaccurate, incomplete or out of date, and we will take reasonable steps to ensure that it is corrected.

Contact us if there is anything you would like to discuss:

If you have any questions, concerns, or complaints about our Privacy Policy, or would like more information about our policy and services, please contact us in writing, by phone, by fax, or by email at the contact details noted below:

The Compliance Manager
Taggart Nominees Pty Ltd
The Taggart Group Pty Ltd
Norwest Central
607/12 Century Circuit
Norwest Business Park
Baulkham Hills NSW 2153

Phone: (02) 9894 9155

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