

Privacy Policy

We Respect Your Privacy

Aspire Retire provides holistic and comprehensive financial planning services, and in doing so requires personal information that allows your advisor to provide specific advice tailored to your current financial and personal circumstances, and objectives. In providing this service, Aspire Retire may request and hold information that can identify you and/or contains information or an opinion about you (“personal information”).

We know that how we collect, use, exchange and protect your information is important to you, and we value your trust. When you trust us with your personal information, you expect us to protect it and keep it safe.

We are bound by the Privacy Act and will protect your personal information in accordance with the Australian Privacy Principles. These principles govern how we can collect, use, hold and disclose your personal information.

This is a summary of our Privacy Policy. You can request a copy of our full Privacy Policy.

What kinds of personal information do we collect and hold?

When you use our services, we collect information that is necessary to be able to provide you with those services. For instance, we may ask for identification information such as your name, address and date of birth.

Why do we collect, hold, use and disclose personal information?

The main reason we collect, use, hold and disclose personal information is so we can

provide you with the services requested. This may include:

- Checking your eligibility for a product or service;
- Providing you with a product or service; and
- Helping you manage a product or service.

How do we collect personal information?

We collect most personal information directly from you. Sometimes we collect personal information about you from other people. For instance, we may need to collect information from other institutions or from publicly available sources of information.

How do we hold personal information?

Much of the personal information we hold will be stored in your client file or electronically in secure data centres. These data centres are primarily located in Australia or may be overseas. We use a range of security measures to protect the personal information we hold.

Who do we disclose your personal information to, and why?

We may need to share your personal information with other institutions for the sole purpose of providing the financial planning service you have sought. For example, service providers such as investment product issuers, insurers, and superannuation fund trustees.

Do we disclose personal information overseas?

It is not our intention to disclose your personal information to recipients located outside Australia.

Do we use or disclose personal information for marketing?

We may use your personal information to offer you direct marketing material of services that we believe may interest you. We will not do this if you tell us not to.

If you don't want to receive marketing offers from us please contact us on the details listed at 'Contact us'.

Access to and correction of personal information

You can request access to the personal information we hold about you. You can also ask for corrections to be made. To do so, please contact us on the details listed at 'Contact us'.

Resolving your privacy concerns and complaints

If you are concerned about how your personal information is being handled or if you would like to make a complaint, please contact us on the details listed at 'Contact us'.

If you are unhappy with our response, you are entitled to contact the Office of Privacy Commissioner who can consider your complaint.

Contact us

If there is anything you would like to discuss, please contact us. If you have any questions or concerns about our privacy policy or practices, contact us by telephone (07 3397 1189) or email us at enquiry@aspiretire.com.au.

Our Privacy officer can also be contacted in relation to privacy concerns by writing to:

Privacy Officer: Stephen Degiovanni
Address: PO Box 350
Stones Corner Qld 4120

1300 66 77 02
aspiretire.com.au
contact@aspiretire.com.au

