

InterPrac Financial Planning Pty Ltd & Joe Vitale Financial Services (JVFS) P/L COLLECTION NOTICE

JVFS P/L ABN 14 005 088 237 under licensee arrangement with InterPrac Financial Planning (**IFP, we, us, our**) collect personal information about you primarily to meet our regulatory requirements to ensure that advice provided under our Australian Financial Services License 246638 is appropriate to you our clients and delivered by appropriately licensed and trained Authorised representatives on our behalf.

If you do not provide the necessary personal information, we may not be able to provide the service, product, or information you have requested from us.

Unless it is unreasonable and impracticable to do so, we collect your personal information from you directly. In some cases, however, we may collect information about you and third parties associated with you or your advisers from a third party, such as your Accountant, Superannuation Fund, Insurer or from another Fund Manager.

In some cases, we will be required or authorised by Australian law, or the order of a court or tribunal to collect personal information about you. We will take reasonable steps to let you know that we have collected your personal information, unless it is obvious from the circumstances that you would know or would expect us to have the information.

We may disclose your personal information to the following third parties:

- VA Platinum Outsourcing services or other third parties.
- our database is available to InterPrac Ltd and its related companies. IFP is a member of the Sequoia Ltd group of companies who provide administration support to IFP.
- Fund Managers, Insurance providers and Superannuation Fund providers for the purpose of placing investments or policies that have been recommended by us and accepted by you.
- IT technicians who may need access when providing on-site support (although it is our practice for them to work under the supervision of one of our own IT technicians);
- file storage service providers; and
- In some cases, we will be required or Authorised by Australian Law, or at the order of a court to disclose your details to regulatory bodies such as Australian Securities and Investment Commission (ASIC), Austrac or other authorised Government bodies.

Privacy Policy

We understand that you value your privacy and wish to have your personal information kept secure. For these reasons, we place a high priority on the security of the personal information we hold. We have developed a Privacy Policy to inform you of how we manage your personal information and maintain its integrity and security.

Our Privacy Policy is available for you to view on our website (<http://interprac.com.au>).

Our Privacy Policy contains information about how you may access the personal information we hold about you, and seek the correction of such information, if you believe it to be incorrect.

Our Privacy Policy also contains information about how you may complain about a breach of the Australian Privacy Principles (**APPs**) and how we will deal with such a complaint.

Contact Us

Our contact details in respect of any issues in relation to privacy are:

Telephone 1800 700 666

Email info@interprac.com.au

Post InterPrac Financial Planning Pty Ltd
Level 8, 525 Flinders Street
MELBOURNE VIC 3000