



## Avery Financial Planning Pty Ltd Privacy Statement

New privacy legislation commencing on 21 December 2001 requires your consultant and Avery Financial Planning Pty Ltd to make the following disclosures before collecting your personal information:

- Your consultant collects personal information in order to give you investment and insurance advice appropriate to your investment objectives, financial situation and particular needs. Depending upon the types of services you require, this may involve preparation of a financial plan, providing financial advice, recommending and implementing investments and reviewing and monitoring your investment portfolio.
- In connection with these purposes, your consultant may need to disclose your personal information to one or more of Avery Financial Planning Pty Ltd's authorised representatives, investment product issuers, insurance providers, superannuation trustees and third parties which provide administrative services (such as reporting) in respect of your investments and for internal and regulatory compliance monitoring purposes.
- Your consultant is required, pursuant to the Corporations Act, Australian Securities and Investments Commission regulations to collect information about you for the purpose of providing you with the services referred to above. If you do not provide the information requested, your consultant might not be able to provide you with the services you require.
- You are entitled to obtain access to the information your consultant holds about you. Contact details are set out below.
- More detailed information regarding Avery Financial Planning Pty Ltd's treatment of personal information is set out in Avery Financial Planning Pty Ltd's Privacy Policy. A copy can be obtained free of charge by contacting our Privacy Officer. Queries for access to your personal information, or other queries, should also be directed to our Privacy Officer.