

## **LIFT Privacy Statement**

LIFT Capital Partners Pty Limited (LIFT Capital) and its related companies acknowledge an individual's right to privacy and recognise that the protection and confidentiality of your personal information is important to you.

Keeping your information private is a high priority at LIFT Capital. We trust this document helps you understand how we collect and handle personal information, how that information is used, stored and protected, and to whom we may disclose your personal information.

Our aim is to comply at all times with the privacy laws (incorporating the National Privacy Principles) that apply to us, and to regularly review our compliance with these privacy obligations. This document may be updated from time to time to reflect any changes in our approach to privacy or information handling procedures.

### **Policies & Practices to Protect Personal Information**

We protect information about you by implementing physical, electronic and procedural safeguards that meet applicable laws.

We also require third party service providers that undertake tasks on our behalf to follow strict standards of security and confidentiality with respect to your personal information.

Our employees are specially trained to handle personal information in accordance with our privacy policy and the National Privacy Principles.

### **Collection and Retention of Personal Information**

The type of personal information we collect will vary according to the product or service we are providing to you and may include:

- information provided by you on application forms or other forms you submit to us which may include your name, address, contact numbers, occupation, assets or income;
- information provided by you through our website, or when you phone or contact our staff which may include your name, address, date of birth and other information as required from time to time;
- information about your transactions with us, our related companies, or third parties, such as account balances, trading history and account activity;
- information we receive from credit reporting agencies.

### **Reasons for the Collection of Personal Information**

The collection of your personal information enables us to establish and maintain a financial services relationship with you to:

- process an application form;
- verify your identity over the phone;
- assess and monitor credit worthiness;
- process transactions and service customer accounts;

- provide information as requested by your adviser, administrator or other person as authorised by you;
- respond to customer queries about applications, accounts or services;
- understand customer requirements and offer products and services to meet those requirements;
- send educational and marketing material from time to time (you may, of course, contact us at any time to ask us not to send such information);
- fulfill legal and regulatory obligations.

### **Disclosure of Personal Information**

In some circumstances LIFT Capital may disclose your personal information to third parties, for example:

- updating of credit information to credit agencies;
- mailing of statements and other marketing material;
- data processing of account transactions;
- for regulatory and compliance purposes;
- for provision of information to a government or regulatory body as required by law (such as the Australian Bureau of Statistics, Australian Taxation Office or a law enforcement agency);
- where a court may direct us to disclose certain information.

### **Access to Personal Information**

You may request access to the personal information we hold about you. We wish to make this process as simple as possible for you. You can seek this information by either sending us a request form (which can be provided by our Privacy Officer), or you can make a request by telephone or in writing.

Prior to releasing any information, we will need to confirm the identity of person requesting access to such information. This helps to ensure we do not provide your private information to anyone who does not have the right to access such information.

Where you believe the personal information we hold is not accurate, complete or up to date please advise us immediately and we will correct our records as necessary.

In particular circumstances it may not be possible for us to give you access to information we hold, however, in those instances we will explain why this is the case.

If you have a query, comment or are dissatisfied about a privacy matter please contact our Client Services Team:

LIFT Capital Partners Pty Limited  
GPO BOX 3812  
Sydney NSW 2001

Telephone: 1300 734 867 or  
02 9210 1800  
Facsimile: 02 9210 1888  
Email: [privacy.officer@liftcapital.com.au](mailto:privacy.officer@liftcapital.com.au)