

Privacy Statement

The purpose of this statement is to let employees, clients and users of know what information is collected about them by the Company when they visit the web site and/or use our services. Cumpston Sarjeant Pty Ltd "CS" supports the National Privacy Principles and operates in accordance with the requirements of the Privacy Act and the amendments and provisions made in 2001.

Privacy in Relation to Web Site Users:

Recording your E-mail Address:

We will only record your e-mail address if you send us an e-mail that requires a response from us. It will only be used for the purpose for which you have provided it to us for, and will not be added to our mailing list. We will not use your e-mail address for any other purpose, and will not disclose it, without your consent.

Collecting Personal Information:

There are forms on this site that can be completed to make a request for some actuarial services (eg SMSF pension certificates). The personal information requested on these forms is required either to enable us to pursue the actuarial service requested, or purely as contact information to allow us to respond to your request. If the personal information is lodged via the web site, every effort will be made to ensure that this is done securely.

Potential clients may prefer to submit such information via mail or fax.

We will not collect or solicit personal information via this site.

External Links:

Our website contains links to other websites. CS is not responsible for the privacy practices or the contents of such websites. You are advised to check the privacy policies of those sites before providing your personal information to them.

Privacy in Relation to Client Documents:

Certain actuarial services (eg SMSF pension certificates) may require additional documentation to be provided to us (eg such as financial accounts). When such information is required, CS recognises the issue of confidentiality and every effort will be made to ensure the security of this information. CS will not disclose this information to outside parties.

CS's policy on the collection of personal tax file numbers is consistent with the Tax File Number Guidelines 1992 (Ch 17 of the Privacy Act).

CS doesn't require Tax File Numbers (TFN's) in any of its work. Therefore, when providing CS with documents relating to individuals that contain individual TFN's, we recommend and prefer that all TFN's be removed.

Under the Tax File Number Guidelines 1992, if we receive documents that contain the individual's TFN, we are required to remove them.

CS will not remove TFN's from documents received from agents acting on behalf of individuals. It is assumed that consent has been given by the taxpayer to the agent to pass on the documents with the TFN's.

If CS receives documents containing individual TFN's, CS will not use or disclose the individual's TFN. Disclosure of TFN's is an offence under the Taxation Administration Act 1953 (Cth).

CS is concerned with the security of the personally identifiable information we collect and has in place reasonable measures to prevent unauthorised access to that information.

CS adheres to the current statutory laws in relation to holding client's financial details. We keep records of all documents provided to us by clients as well as records of the services we have provided. We have a documented backup procedures (which includes the process of scanning and archiving files) and documented disaster recovery plan.

CS's appointed Compliance Officer is Diana Droog. If you believe your personal information has been used in a way that is not consistent with this policy, or you have any further questions related to this policy, please contact her by email at diana.droog@cumsar.com.au.

Written inquiries may be addressed to:

Diana Droog
Cumpston Sarjeant Pty Ltd
Level 13, 160 Queen St
MELBOURNE VIC 3000

We will attempt to address your enquiry promptly. If we fail to resolve any complaint regarding breach or potential breach of our privacy policy to your satisfaction, you are entitled to contact the Office of the Privacy Commissioner for further investigation of your complaint.

This policy will be reviewed regularly, and changed to meet changes in industry practices, legislation or the business environment. For further information please see the Office of the
Privacy Commissioner

This policy was last amended 2009