

If we are entitled under the Australian Privacy Principles to refuse to give you access, we will tell you and provide reasons for our decision.

We will not charge a fee for making a request to access your personal information however we may charge a fee for accessing your personal information. If a fee is applicable, we will disclose this to you prior to providing you with the information.

### **Storage and Security**

We will at all times seek to ensure that the personal information collected and held by us is protected from misuse, loss, unauthorised access, modification or disclosure. At all times your personal information is treated as confidential and any sensitive information is treated as highly confidential. Your personal information is generally held in your client file which may be in hardcopy or electronic.

In the event you cease to be a client of Forrest, any personal information which we hold about you will be maintained on a secure online facility. Forrest will ensure that any documents that are destroyed are done so in a secure manner.

### **Email Communication**

As electronic communication becomes more and more part of our daily business lives, Forrest will use your email address that you have provided to contact you when necessary or to provide you with information you have requested. We will also use your email address to alert you to marketing initiatives, newsletters, or events that may interest you.

If at any time you decide you do not wish to receive such marketing information you have the right to ask us not to send you any further such material.

You may do this by advising your adviser or by sending us an email with "Unsubscribe" in the subject line.

Please allow two weeks for this instruction to take effect.

### **Website**

Forrest complies with the Australian Privacy principles also applies to your access to our website. Our privacy policy may be accessed from the website and other information is also posted there for your convenience.

Please notify Forrest immediately if you become aware of a breach of your security.

Our website uses cookies which allow us to identify your browser while you are using our site. Whilst cookies do not identify you, they allow us to track usage patterns. If

you do not wish to receive cookies, you can instruct your web browser to refuse them.

### **What if some of the information Forrest holds is wrong?**

Please tell us. We want our records to be accurate, complete and up to date and we rely on the accuracy of the information to provide you with appropriate recommendations. Unless we disagree with you about the accuracy, currency or completeness of a record, we will generally correct it if requested, (or suggest alternative arrangements for updating our records). If we disagree with you, we will give you our reasons and record your objections on file.

### **How do I make further enquiries or complain about a breach of privacy?**

If you wish to complain about any breach or potential breach of this privacy policy or the Australian Privacy Principles, you should contact us and direct your complaint to the Privacy Officer. We will respond to your complaint within 7 days.

We will use our best endeavours to resolve any complaint to your satisfaction; however, if you are unhappy with our response, you are entitled to contact the Office of the Privacy Commissioner who may investigate your complaint further.

ATTN: Privacy Officer  
Forrest Private Wealth Management Pty Ltd  
57 Forrest Street SUBIACO WA 6008

Telephone: (08) 9382 1866

Email: [enquire@forrestprivatewealth.com](mailto:enquire@forrestprivatewealth.com)

Website: [www.forrestprivatewealth.com](http://www.forrestprivatewealth.com)

### **Changes to this Privacy Policy**

We reserve the right to review and amend this Privacy Policy from time to time but will advise you of any material changes.