

PRIVACY POLICY

Personal Information

When opening an account with Alpha Financial Services (Licensee: Lionsgate Financial Group (LFG)), you provide us with personal information such as your full name, address and telephone numbers. Other personal information collected may include proof of identity, personal financial details, and tax file numbers. Naturally we consider this information to be confidential and take all reasonable steps to protect it under Alpha Financial Services (AFS) and LFG's Privacy Policy.

Purpose of collecting personal information

The primary purpose of collecting personal information is for opening and maintaining an account for you (including facilitating distribution of payments and relevant corporate communications).

The information may also be used for the secondary purposes of conducting market or customer satisfaction research, developing and identifying products that may interest you and (unless you ask us not to) providing you with information about other products and services offered by AFS & LFG, related parties or other organisations. If at any time you do not wish to receive information about other products and services, please inform us in writing or contact our Privacy Officer.

Disclosure to third parties

Your personal information may be disclosed to related parties of AFS & LFG, government agencies, agents and contractors including print service providers and mail houses, our insurers, as required by law and any person to the extent necessary, in our view, in order to carry out your instructions.

If you change your adviser/Authorised Representative or decide you no longer wish your adviser/Authorised Representative to have access to personal information that we hold about you, then you need to advise us and your adviser/Authorised Representative in writing.

It is not compulsory to provide certain personal information requested by us. However, if some of the personal information is not provided by you, we may not be able to open an account for you.

Access to your information

You can correct and update the personal information we hold about you by contacting in writing your adviser or our Privacy Officer.

If you wish to access and review personal information, you must submit a written request outlining the relevant terms of reference for the attention of the Privacy Officer. We will endeavour to process and respond to requests in a timely manner.

Contacts

If you have any questions regarding the AFS/LFG Privacy Policy or how your information is treated, please contact:

Privacy Officer

Lionsgate Financial Group Pty Ltd
P: 1300 683 323
F: 1300 661 916
M: PO Box 260 Oatley NSW 2223