

PRIVACY COLLECTION STATEMENT

RSM Financial Services Australia Pty Ltd (RSM)
Australian Financial Services License (238 282)

1. Purpose of Collection

RSM collects your personal information to provide you with financial advice, to answer your queries and to provide ongoing services as your financial advisers.

We may also share your information with other entities in the RSM Australia Group, to assist with the provision of accounting and taxation services.

Use and disclosure – Marketing

In addition to the primary purpose of collection identified above, your information may be shared within the RSM Australia Group to allow them to inform you about other service lines that may suit your needs.

2. The personal information that RSM collects.

RSM collects and holds the following personal information:

- Your name
- Date of birth
- Address
- Tax file number
- Details of your personal and financial affairs, including your needs and objectives, as provided by you to allow for the provision of personal financial advice.

If it is reasonably necessary in the circumstances, we may also collect sensitive information (which is a type of personal information) such as a person's medical history or medical health checks, membership of a professional organisation or criminal record.

3. Security

We will take all reasonable steps to protect the security of the personal information that we hold. This includes appropriate measures to protect electronic materials and materials stored and generated in hard copy.

4. Access to your information

You have a right to access the personal information that we hold about you. Should you wish to do so please contact us using the details provided below.

5. Correction

RSM will in accordance with Australian financial services law take reasonable steps to ensure that your personal information is accurate and up to date. If you believe the personal information RSM holds about you is inaccurate or out of date, you may request that RSM corrects this information by notifying your adviser.

You may request that RSM notify certain third parties of changes to your personal information.

6. Retention

RSM is required by law to retain your personal information for a period of seven years, from the date that we last provided you with a financial service. After this time your information will be destroyed.

7. Privacy Policy

This Privacy Collection Statement should be read in conjunction with the RSM Privacy Policy available ([here](#)) or on rsm.com.au.

The RSM Privacy Policy contains further details concerning:

- The information we collect and the reasons we collect the information.
- The use and disclosure of your personal information.
- Overseas disclosure of your personal information.
- How you can access and correct your information.
- How you can lodge a privacy complaint and how we will deal with your complaint.

8. Contacting the RSM Privacy Officer

RSM Privacy Officer and Data Controller
RSM Financial Services Australia Pty Ltd

GPO Box R1253
Perth WA 6844
T 618 92619100

