

## **Introduction**

- 1 Sagacious Investment Services (ABN 18 615 401 893) Privacy Policy complies with Australian Privacy Legislation.
- 2 Sagacious Investment Services ensures that all reasonable steps in relation to the protection of a Consultant's, a Client's, and a Prospective Client's personal information are taken. All Sagacious Investment Services Staff, Consultants, and Advisors are bound by signed agreements of which include:
  - a Abiding by and adhering to this Privacy Policy, and
  - b Abiding by and adhering to the specific confidentiality requirements within their signed agreements which bind them not to divulge any personal information about any Consultant, Client, or any Prospective Client, in writing, or verbally, or by any other means, to any third party during the term of their agreement or any time thereafter.

## **Collection of Personal Information**

- 3 The collection of a Consultant's information is limited to the information supplied as required on the Sagacious Investment Services Consultancy Agreement.
- 4 The collection of a Client's or Prospective Client's personal information is limited to:
  - a The information supplied as required on the following Sagacious Investment Services documents:
    - Investment Enquiry,
    - Private Loan Agreement,
    - Private Loan Extension Agreement, and
  - b Any personal information that is provided, either written or verbal, during the process of doing business.

## **Use of Personal Information**

- 5 Other than as provided for in Clause 6 Sagacious Investment Services does not share a Consultant's, a Client's, or a Prospective Client's personal information with any other company, organization, or third party.
- 6 The use of a Consultant's, or a Client's personal information is limited to providing their bank account details to Sagacious Investment Services' banker for the purpose of transferring money into the Consultant's, or Client's, nominated bank account.

## **Retention of Personal Information**

- 7 A Consultant's personal information including their Consultancy Agreement is retained in a secure and locked cabinet, and is retained for a period of 7 (seven) years after the date their Consultancy Agreement is terminated..
- 8 A Client's personal information is retained in a secure and locked cabinet for a period of 7 (seven) years from the date it was provided to Sagacious Investment Services. Only persons specifically authorized by Sagacious Investment Services have access to that information and are bound by signed confidentiality agreements.
- 9 A Prospective Client's information is retained:
  - a Until they become a Client, or
  - b If the investment is not proceeded with, then that Investment Enquiry document will be destroyed on the written request of the Applicant/s or twelve (12) months after the Investment Enquiry document was submitted to Sagacious Investment Services.

## **Accessing Your Personal Information**

- 10 You have a right to access your personal information, subject to exceptions allowed by law. If you would like to do so, please let us know. You will be required to put your request in writing for security reasons.

## **Changes to this Privacy Policy**

- 11 Sagacious Investment Services reserves the right to make amendments to this Privacy Policy at any time.

## **Contacting Us**

- 12 Sagacious Investment Services welcomes your comments regarding this Privacy Policy. If you have any questions about this Privacy Policy and would like further information, please contact us by one of the following means:

Email: sagaciousinvestmentservices@gmail.com

Mail: 87 Regent St, Riverstone, NSW, 2765