



BLAKE LIFE AND RISK

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PRIVACY STATEMENT

Respecting your privacy and the law

At Blake Life and Risk Pty Ltd, (Authorised Representative 1267975 of KPS Wealth Pty Ltd ABN 62 646 321 799) we are dedicated to protecting your privacy and safeguarding your personal information.

Blake Life and Risk Pty Ltd is bound by the Commonwealth Privacy Act and the National Principles for the handling of personal information which are set out in that Act.

About this privacy policy

There is a single privacy policy for all Blake Life and Risk Pty Ltd clients.

This privacy policy outlines to you all the ways in which Blake Life and Risk Pty Ltd (also referred to as 'we' or 'us' in this policy) aims to protect your personal information and what sort of personal information we hold about you, for what purposes and how it is collected, held, used and disclosed.

Personal information is any information, including an opinion, that can be used to identify and individual or can be linked to an individual. By continuing to use the products and services recommended by Blake Life and Risk Pty Ltd, you consent to us dealing with your information in the manner set out in the privacy policy.

What information we collect

Subject to legislative requirements, we will only collect personal information relevant to our business relationship with you. There is some personal information, which is necessary for us to collect to be able to provide you with a specific product and service, and in order for us to satisfy our obligations under relevant legislation such as Anti-Money Laundering and Counter Terrorism Financing Act 2006 ('AML-CTF Act'). If you do not provide this personal information, we may not be able to provide you with the product or service you have requested.

There are occasions where we may need to collect personal information from other parties with or without your direct involvement. Depending upon the product or service you have been recommended, some examples (but not limited to) of the persons or organisations from which we may collect person information, include:

- Service providers engaged to do something for or on behalf of Blake Life and Risk Pty Ltd.
- Publicly available sources of information (such as telephone directories, social media)
- Your representative (such as your legal adviser or accountant)
- Your employer
- Insurers and reinsurers, if you obtain insurance through us (including insurance obtained through a product or services administered or recommended by us).

Protecting your information and website security

We will take reasonable steps to protect your personal information from misuse, loss and unauthorised access, modification, and disclosure.

Paper documents are protected from unauthorised access or use through the various security systems that we have over our physical premises. We also maintain up-to-date computer and network security systems with appropriate firewalls, encryption technology and passwords to protect electronic copies of personal information.

To ensure the security of your personal information, we ask that you observe the security requirements that relate to the use of your personal identification number and/or passwords used to access your investments or products or use our services electronically.

We cannot guarantee the policies and procedures of any other websites. They may or may not comply to the same privacy standards that we do and therefore you should take care to evaluate their particular privacy standards and procedures as needed.

Using Government identifiers, such as tax file numbers and Medicare numbers

We do use tax file numbers, Medicare numbers and other Government identifiers (including but not limited to Drivers' Licences) for the purposes of identifying you with our recommended product or services providers, as required.

This information is only passed on to authorised product or service providers in writing, in an authorised format, in order to facilitate your requirements.

Keeping your information accurate and up-to-date

We maintain your personal information by taking reasonable steps to make sure that the personal information collected, used and disclosed is accurate, complete and up-to-date.

So we can maintain the accuracy of your personal information at all times, we ask that you notify us immediately when you change your contact details such as your telephone number, email or address, or if you become aware that any personal information we hold about you is incorrect. See (contact us).

Accessing your information

You can access most of the personal information we hold about you and request corrections.

Your right of access is subject to some exceptions. For example, you may not be able to obtain access to personal information which:

Would reveal personal information about another person

Changes to the privacy policy

We can make changes to our privacy policy and the processes and systems relating to how we handle your personal information, from time to time, and for any reason. We will update this policy to reflect any changes.

Resolving your privacy issues

Blake Life and Risk Pty Ltd is bound by the Commonwealth Privacy Act and the ten National Privacy Principles for the handling of personal information, which are set out in that Act. Our policies, processes and systems have been developed to ensure we comply with all our obligations under the Privacy Act.

If you have a privacy concern;

1. Contact Blake Life and Risk Pty Ltd

Phone: 07 4771 6089 (Townsville)

Phone: 07 3715 8415 (Brisbane)

Where possible, your concerns received over the telephone will be resolved at that time.

Email: admin@blakelifeandrisk.com.au

Where possible, your concerns received via email will be resolved within 20 working days.

2. Write to Tim Klingner (Partner)

If you feel your concerns have not been resolved, please refer the matter in writing to:

Mail: Blake Life and Risk Pty Ltd, PO Box 1682, Townsville, QLD 4810

Tim Klingner will review your concern and will endeavour to resolve the situation within 30 days of receiving the letter.

3. Contact office of Australian Financial Complaints Authority (AFCA)

If you are still not satisfied with our response, you may contact the Office of Australian Financial Complaints Authority. They can be contacted on their free call number: 1800 931 678. You may also contact the Financial Ombudsman Services (FOS) – they are an independent complaints body.

FOS contact details are:

Financial Industry Complaints Services Limited.

Contact us

If you would like to contact us about this policy or the products and services we recommend, please contact us by:

Phone: 07 4771 6089

Email: admin@blakelifeandrisk.com.au

Mail: PO Box 1682, Townsville QLD 4810