Privacy Statement

Preparation date: 23/09/2019
Version: 1.0.2

Lantana Private Wealth Pty Ltd

Lantana Private Wealth is committed to ensuring the confidentiality and security of your personal information. Our Privacy Policy, which details our handling of information, is available upon request or by accessing our website http://www.lantanaprivatewealth.com.au/

1.The entity collecting the information

The identity and contact details of Lantana Private Wealth are as follows:

Lantana Private Wealth Privacy Officer: Brett Jackson

Mobile: 0409 506 828

Landline: (03) 9832 0962

Email: info@lantanaprivatewealth.com.au

Address: Suite 208. 23 Milton Parade. Malvern 3144. VIC

2.How do we collect personal information?

We generally collect information about you from Fact Find, emails, phone calls, face-to-face meeting and online client portals (Adviser Logic, MyProsperity and/or Praemium). We may also obtain credit information about you from credit providers and credit reporting bodies on your behalf if necessary for us to provide our services to you.

3.Why do we collect personal information?

Lantana Private Wealth collects and holds personal information for the purposes set out in the Lantana Private Wealth Privacy Policy.

4.Consequences of not providing us with the information

If you do not provide some or all of the personal information requested by us, we may be unable to provide you with our products or services.

5.Use and disclosure of information

We may use and disclose the personal information we collect about you for the following purposes:

- to assist Lantana Private Wealth in providing a product or service to you;
- completion of documentation and application forms;
- to consider and assess your request for a product or service;
- to provide you with information about a product or service and invite you to marketing events;
- to protect our business and other clients from fraudulent or unlawful activity;

- to consider any concerns or complaints you may have;
- to conduct our business and perform other management and administration tasks;
- to manage any legal actions involving Lantana Private Wealth;
- to comply with relevant laws, regulations and other legal obligations; and
- to help us improve the products and services offered to our clients, and to enhance our overall business.

6.Who will the information be disclosed to?

The types of organisations to whom we may need to disclose your personal information to include:

- a related entity of Lantana Private Wealth;
- an agent, contractor or service provider we engage to carry out our functions and activities, such as our lawyers, accountants, or other advisors;
- organisations involved in a transfer or sale of all or part of our assets or business;
- organisations involved in managing our payments, payment merchants and other financial institutions such as banks.;
- regulatory bodies, government agencies, law enforcement bodies and courts;
- your guarantor, referee(s), employer or co-account holder;
- financial product issuers and credit providers;
- a debt collector; and
- anyone else to whom you authorise us to disclose it.

7.Your rights

- Our Privacy Policy contains information about how:
- you may access the personal information we hold about you;
- you may seek the correction of your personal information;
- you may ask us to provide an alternative means of identity verification for the purposes of the Anti-Money Laundering and Counter Terrorism Financing Act 2006 (Cth); and
- you may complain about a breach of the Privacy Act, including the APPs; and
- Lantana Private Wealth will deal with a privacy complaint.

8.Marketing material

We may use personal information we collect from you to send marketing material from time to time, unless you elect not to receive the material. We will not provide your personal information to any third party other than in accordance with our Privacy Policy.