



PRIVACY STATEMENT

Portfoliolink Unit Trust (Portfoliolink) abides by the National Privacy Principles established under the Privacy Act 1988 and the Privacy Amendment (Private Sector) Act, 2001.

Collection, Use And Disclosure of Your Information

Portfoliolink collects personal information about you to provide you with the services that you request. In most instances, we collect your personal information from you when you fill out an application form, but we may also collect information from you which you provide to us over the telephone or internet. In some situations, we may collect your personal information from a third party such as your financial planner, adviser, accountant or another organization with which we have an arrangement for the promotion and sale of products and services offered or distributed by us.

The type of product or service you request will determine the type of personal information we collect. When we have collected your personal information, we use it to provide you with a product or service appropriate to your needs.

Portfoliolink may disclose some of your personal information to external organizations who assist us in administering the provision of the products or services to you. For example, where your financial planner, adviser, or accountant work with us to provide products and services to you.

Like other financial services companies, there are situations where Portfoliolink may disclose your personal information in circumstances where it is:

- Required by law (such as to the Australian Tax Office) and,
- Authorized by law (such as where we are obliged to disclose information in the public interest or to protect our interests).

We may also use your personal information to keep you informed of new services or special arrangements offered or distributed by us. Again when conducting our marketing activities, we may disclose some of that information to our service providers.

Storage And Security

Your personal information is generally held in your Client File. Information may also be held in one or more computer databases.

Portfoliolink will at all times seek to ensure that the personal information collected and held by it is protected from misuse, loss, unauthorized access, modification or disclosure. At all times your personal

information will be treated as confidential and any sensitive information is treated as highly confidential. All paper files are stored in lockable cabinets or rooms, which are locked out-of-hours.

In the event you cease to be a Client of Portfoliolink, any personal information which is held about you will be maintained in a secure off site storage facility for a period of 7 years in order to comply with legislative requirements, following which time the information will be destroyed.

Correction Of Information

Portfoliolink relies on the accuracy of the information you provide to fulfill your needs and protect your information. Portfoliolink will endeavor to ensure that, at all times, the personal information about you, which it holds, is up to date and accurate. In the event that you become aware, or believe, that any personal information which Portfoliolink holds about you is inaccurate, incomplete or outdated, you may contact Portfoliolink by any of the methods detailed on page 3.

Access

Under the National Privacy Principles, you are generally entitled to access your personal information held in our records.

You may, at any time, by contacting Portfoliolink by any of the methods detailed on page 3, request access to your personal information and Portfoliolink will (subject to the following exceptions) provide you with access to that information either by providing copies of the information requested, allowing you to inspect the information requested or providing you with an accurate summary of the information held. Portfoliolink will, prior to providing access in accordance with this policy, require you to provide evidence of your identity.

Portfoliolink will not provide you with access to your personal information if:

- Providing access would pose a serious threat to the life or health of a person;
- Providing access would have an unreasonable impact on the privacy of others;
- The request for access is frivolous or vexatious;
- The information related to existing or anticipated legal proceedings between Portfoliolink and you and would not be discoverable in those proceedings;
- Providing access would reveal Portfoliolink's intentions in relation to negotiations with you in such a way as to prejudice those negotiations;
- Providing access would be unlawful;
- Denying access is required or authorized by or under law;
- Providing access would be likely to prejudice certain operations by or on behalf of an enforcement body or an enforcement body requests that access not be provided on the grounds of national security.

In the event Portfoliolink refuses you access to your personal information, Portfoliolink will provide you with an explanation for that refusal.

Portfoliolink will endeavour to respond to any request for access within 7 days depending on the complexity of the information and/or the request. If the request is urgent you should indicate this clearly.

Portfoliolink reserves the right to charge for the costs associated in providing information. In the event that you wish to access personal information held by your adviser, you should approach that adviser directly.

Complaints Process

Should you wish to make a complaint which relates to your privacy, we encourage you to contact our Privacy Officer on 1300 959 466 in the first instance. If your complaint cannot be resolved over the telephone, we may ask you to lodge a written complaint. If this happens, or if you prefer to put your complaint in writing, please address it to:

The Privacy Officer
Portfoliolink
PO Box 218
SHERWOOD QLD 4075

Facsimile : 1300 959 476

Alternatively your concerns can be emailed to: office@portfoliolink.com.au

Changes To This Privacy Policy

We reserve the right to review and amend the Privacy Policy from time to time.