

Information and Privacy Agreement

I/We agree that:

1. I am/we are to receive financial planning services from the adviser named in this Client Profile [**“adviser”**] and understand that my/our personal information (including any sensitive information such as health information and membership of professional organisations [**“sensitive information”**]) is being collected primarily for that purpose.
2. I/We acknowledge the privacy notification in the Financial Services Guide, that I/we have access to the Privacy Policy and understand that my/our personal information will be used and disclosed as outlined in the Policy available from my/our adviser.
3. I/We also consent to the disclosure of my/our personal information (including my/our sensitive information):
 - to organisations involved in providing my/our adviser with marketing services and to their service providers (for example posting services), so that my/our adviser may offer me/us products and services that might meet my/our financial needs; and
 - to other organisations in connection with the sale or proposed sale of all or part of the adviser’s business and to the use of that personal information by those organisations for those purposes.
 - to other professionals who may need to be engaged in order to implement certain components of my/our adviser’s business succession advice.
4. I/We also consent to the collection of my/our personal information for the purpose of my/our adviser providing the services stated above. This consent also relates to my/our sensitive information.
5. If I/we have provided personal information about an individual (such as a partner, dependant, employer or accountant) I/we have or will as soon as practicable, provide the individual with a copy of the **Financial Service Guide** which includes how you manage personal information and make them aware that this section applies to their personal information that has been collected for the purpose of my/our adviser providing me/us with the financial advice I/we have requested.
6. If I/we have provided sensitive information about someone else, I/we have or will obtain the consent of that person to that information being collected by my/our adviser and my/our adviser’s service providers.
7. I consent to the release of my personal information (including my sensitive information) to my spouse or partner.