

PRIVACY POLICY

Revised 14/07/2022

Our Commitment to you,

Dolphin Partners Pty Ltd recognises that your privacy is very important. We are committed to providing you with high quality financial services within a secure and confidential environment. Our privacy statement includes for your information:

- What information we may collect from you
- How your information may be used
- The security of any information you provide
- How you may access and correct your information
- How you can contact us

What Information we collect from you.

Dolphin Partners will only collect personal information for the purposes of providing financial services and information to you. In providing these services we are subject to certain legislative and regulatory requirements which will necessitate us obtaining and holding personal information. This will also assist us in our ability to provide you with appropriate advice to match your financial objectives. Failure to provide full and complete information we request may mean that we are unable to provide you with an adequate service. Once we hold personal information, we will take reasonable steps to keep it accurate, complete and up-to-date.

Use and disclosure

We will only use your personal information for the purpose of meeting your investment and service requirements. If considered appropriate we may also use your personal information for internal communication purposes such as sending you research, newsletters and notifying you of new products and services that may be suitable in meeting your financial plans and objectives, unless you notify us that you do not wish to receive such communications.

We will only disclose personal information to third parties carrying out functions on behalf of Dolphin Partners on a confidential basis, for example those who assist us with mail-outs and other services. You should note that information we collect from you may also be disclosed to third parties if that disclosure is required or authorised by law.

Security of information

We will protect personal information from misuse or loss and destroy or permanently de-identify personal information where we deem it to be no longer required.

Access and updating of information

You can request details of any personal information that we hold about you at any time. To amend personal information, contact your adviser at Dolphin Partners on (03) 9982 8500.

Our website – cookies

A cookie is a small file placed on your computer and contains information about your visit to our website. We do not use the cookie to collect or store personal information about you. If you do not wish to use cookies you can adjust the settings on your browser to reject cookies. Our site may contain links to other websites and Dolphin Partners is not responsible for the privacy practices or the content of third-party websites.

Identifiers

We will not adopt as our own identifiers information that you provide to us such as Tax file numbers (TFN's) and Medicare numbers.

Complaints and Resolution

We are committed to providing our clients and other parties whose personal information we hold a fair and responsible system for handling privacy issues. If you have any concerns regarding privacy, please contact our Privacy Officer as outlined below. We will seek to address any concerns that you may have through our complaints handling processes, but if you wish to take matters further you may refer your concerns to the Office of the Federal Privacy Commissioner.

How you can contact us

If you have any questions or feedback about this statement or any privacy issues concerning Dolphin Partners, please contact the Privacy Officer, Lewis Vassos in writing or via e-mail: lvassos@dolphinpartners.com.au