

PRIVACY POLICY

Commercial Brokers Australia P/L A.B.N 70 107 570 936
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What information is collected?

At the time of taking an application personal information is collected such as; Full names, addresses, contact numbers, email address and employment information and copies of identification.

Along with personal information, financial information is also collect consisting of, but not limited to; asset & liability statement, business financials and tax returns, personal tax returns, group certificates and any other confirmation of income.

How is the information collected?

Personal information is collected at time of interview. If financial information is not collected at time of interview this is provided by; post, email or fax.

How is this information used?

Your information is used for the purposes of a finance application and is provided to financial institutions in relation to this purpose only. Information is provided electronically by fax or email.

Your contact details are added to our database as being a client of this office. This information is not disclosed to any third parties, other than financial institutions in regard to any applications.

Your information may be provided to third parties such as Financial Planners, Accountants, Solicitors, etc. This is not done without your prior authorisation.

We may contact you from time to time by post or email. You are able to opt out of these at any time by selecting *unsubscribe* on emails or contacting this office on 1300 850 657.

Storage of information

Your personal information is required to be retained by this office for a period of 7 years from the date of your most recent application.

Financials and tax returns are held for 2 years after which time they are destroyed. This information, when current is stored either on file (hard copy) or electronically – with both storage options Tax File Numbers (TFN) are removed and are not recorded on any documentation held.

All electronic information is stored on a central server and can only be accessed by password. Physical files are kept on the premises in secured filing cabinets.

If we accept an application from you and it does not proceed we are still required to retain this information for a period of 7 years. This information will be retained electronically only and after 7 years will be deleted from our server and any databases.

What are my rights?

If at any time you feel we do not hold current or correct information, you are able to contact us by phone or email to update.

If we contact you via any marketing activities you have the right to opt out at any time by contacting this office.

You have a right to request a copy of your information at any time.

If you have a concern or complaint in relation to our compliance with the Australian Privacy Principles please contact us in writing, via email or post.