



Privacy Policy

Privacy with Health Super Financial Services Pty Ltd (HSFS) trading as FSS Financial Planning (FSSFP)

FSSFP is regulated by the amended Privacy Act 1988 (“the Privacy Act”), and the Health Records Act 2001 (Vic.) (“the Health Records Act”), which establish new rules for the collection and use of personal information and health information, respectively. These new rules are in force from 21 December 2001 under the Privacy Act and from 1 July 2002 under the Health Records Act. “Personal information” includes sensitive information and health information.

FSSFP is generally required to obtain consent before it collects any sensitive or health information from clients. So that your consent will be informed, and pursuant to the National Privacy Principles (“NPPs”) contained in the Privacy Act, we supply the following “Collection Notice” for your information.

This notice sets out:

- the purpose for the collection of information;
- the organisations to which we disclose information;
- the consequences if information is not provided;
- our contact details;
- access details; and
- how information is collected.

FSSFP has also compiled a detailed statement, which provides more information about how FSSFP handles your personal, sensitive and health information. This statement is available on request. However, if you would prefer, we have a shorter statement, which is a concise summary of the previous statement.

The FSSFP Collection Notice For Personal, Sensitive and Health Information

- 1.** HSFS is licensed under the Australian Financial Services Licensing (AFSL) regime (AFSL No 240019). FSS Financial Planning is the trading name under which HSFS operates.
- 2.** In collecting personal, sensitive and health information about you, FSSFPs primary purpose is to:
 - establish you as a client;
 - prepare a financial plan;
 - administer and invest your assets;
 - provide information to you about investments and strategies; and
 - provide financial services and advice to you.

- 3.** There are some instances in which FSSFP may need to disclose your personal, sensitive and health information to others. For example, disclosure may be made to: insurers, underwriters, professional advisors, auditors, actuaries, regulatory authorities, approved dispute resolution bodies, financial institutions and mail houses. Confidentiality and privacy are important concerns to FSSFP and every effort is made to ensure that this is reflected in the handling of your personal, sensitive and health information by third parties.

FSSFP may also be required to disclose details of your personal, sensitive and health information in some other circumstances where disclosure is expressly required by law such as to the Australian Taxation Office, Centrelink or to the Australian Securities and Investments Commission.

- 4.** If information is not provided, or is incomplete or inaccurate, depending on the nature of that information, it may:
- delay provision of financial advice or services;
 - result in you paying more tax than may otherwise apply;
 - result in the provision of inappropriate financial advice or services; and
 - prevent us from being able to contact you.
- 5.** FSSFP can be contacted by phone, fax, email or in writing.

Contact details

VICTORIA

The Manager – HSFS

ABN 37 096 452 318
Australian Financial Services
Licence Number 240019

Post PO Box 331, Collins Street West, VIC 8007
Email info@hsfp.com.au

Telephone 1300 78 02 23 or (03) 8613 9717
Internet www.HSFP.com.au
Fax (03) 9629 5235

Come in

Level 19, 447 Collins Street,
Melbourne, VIC 3000

NEW SOUTH WALES

The Manager – FSS Financial Planning

Post PO Box R352, Royal Exchange, NSW 1225
Email enquiries@fssfp.com.au

Telephone 1800 665 756 or (02) 9238 2500
Internet www.FSSFP.com.au
Fax (02) 9238 2599

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Level 16, 83 Clarence Street,
Sydney NSW 2000

You will, in most cases, be able to access the personal, sensitive and health information that we hold about you by either making an appointment to come into our office to view it personally, or by calling to request a copy of information held by us.

There are exceptions to the general requirement to allow you access to your personal, sensitive or health information. Where FSSFP believes that the information that you request is in one of the limited exceptions, FSSFP will, where possible, use an agreed intermediary as an alternative to complete denial of access. There will be no charge to clients for access to personal information.