Privacy policy

Issued June 2008

Advice and services

We provide financial advice and services through a nationwide network of advisers, including personal and corporate risk management, wealth creation, and retirement planning. Access to associated services such as stockbroking and mortgages is also available.

Our commitment

To provide advice and give you financial services, we need to collect personal information about you. We acknowledge and understand the nature and sensitivity of your personal information and are committed to maintaining your privacy. It may also be a requirement to obtain personal information about your spouse, dependants and other interested parties such as a business partner. You will need to tell that person that we hold personal information about them, the purpose for which we hold that information, and the right to access.

What information do we collect about you?

We collect information and will hold information about you that will ordinarily be capable of identifying you. Primarily the information is needed so we can provide the advice and services agreed upon. Your information may include, but is not limited to, your name, address and financial situation, and may extend to more sensitive information such as your health. Should sensitive information be collected we will request your consent to use the information where appropriate.

We will take all reasonable steps to collect the information from you alone. However it may be necessary to obtain information about you from a third party, in which case we will obtain your consent. We may also obtain information about you by virtue of you accessing our websites. Information will be collected by lawful means and we will inform you why the information is necessary.

Should you choose not to provide information that can identify you, or should you withhold information reasonably requested, we may be precluded from or restricted in providing services to you. This could result in you making a commitment that is not appropriate to your needs.

In your dealings with us, we will take reasonable steps to maintain the currency, accuracy and completeness of your information. Please contact us at the address below if you believe the information we hold about you is not accurate or current. Once our obligations in terms of services rendered cease, we will de-identify and destroy that information.

What we do with your information?

The purpose for which we collect information about you will be disclosed to you and the information will be used for that agreed purpose, or if required or permitted by law. It may sometimes be necessary to use the information for an additional but related purpose and we will obtain your consent to do so.

In the course of providing the agreed services to you it may be necessary to provide your information to third parties. You will be notified of this event. We will endeavour to ensure the recipient will be bound by and committed to maintaining your privacy.

We are required under the Rules of Professional Conduct of the Financial Planning Association of Australia to make certain information available for inspection by the Association on request to ensure ongoing compliance with mandatory professional standards. This may involve the disclosure of your personal information.
We are also obliged under the Corporations Act to maintain certain transaction records and make those records available for inspection by the Australian Securities and Investments Commission.
We may use the personal information collected from you for the purpose of providing you with direct marketing material, such as articles that may be of interest to you. However, you may, by contacting your adviser, request not to receive such information.

In the event that we propose to sell our business, we may disclose your personal information to potential purchasers for the purpose of them conducting due diligence investigations. Any such disclosure will be made in confidence and it will be a condition of that disclosure that no personal information will be used or disclosed by them. In the event that we sell our business, we may transfer your personal information to the purchaser of the business. As a client you will be advised of any such transfer.

Access to your information

We undertake to provide you with access to your information provided your request is reasonable and provided we are not precluded from doing so by any law or proceedings, legal or otherwise.

What security can you expect from us

We have implemented reasonable measures to protect your information from unauthorised access, usage or loss. Our security measures are updated when required.

Amendments to our privacy policy

This policy and its effect may be amended from time to time as necessary, or if required by law. Any changes will be reflected on our website or you can ask us for a copy of our current policy.

Use of this website

The Genesys website contains links to other websites whose operator may or may not adhere to a privacy policy or be governed by the National Privacy Principles.

The information collected about you by this website depends on the options accessed by you on the website. Anonymous data is collected from our website to evaluate its performance. Our website may use ‘cookies’ that allow us to identify your browser while you are using our site. Cookies do not identify you; they simply allow us to track usage patterns so that we can measure the level of interest in various areas of our site. All browsers allow you to be notified when you receive a cookie and elect to either accept it or not.

Your Internet service provider should be able to assist you to set your preferences.

If you provide us with personal details via this website, we may request personal information such as your name, address and contact phone number. We will only receive information submitted by you. We will use the submitted personal information for the purposes of sending the information to one of our financial planners and will only disclose it to our financial planners so that they may contact you to discuss your financial needs.

We will not sell your information or disclose it to others for marketing purposes. We will retain any emails submitted by you to us, and may use your email address to send information which may be of interest to you. You can at any time request us to remove your email address from our mailing list.

Your personal information that is recorded on our server is protected by encryption technology and a system of secure passwords, logons and/or other security procedures.

Contact us

If you have a query about privacy, you can contact us using the details below:
Phone: 1800 066 577
Post: Genesys Wealth Advisers Limited
GPO Box 3936
Sydney, NSW 2001

You may also refer any concerns you have to the Federal Privacy Commissioner:
Phone: 1300 363 992
Post: GPO Box 5218
Sydney NSW 1042