

Privacy Collection Notice



Privacy of your personal information

KeyInvest is committed to ensuring that your personal information is handled in accordance with the Privacy Act 1988 (**Act**).

How information is collected from you

We need to collect personal information about you to provide you with our financial products/services. We will collect your information from you directly whenever we can, including verbally or in writing.

How information is collected from other sources

Sometimes we will collect information about you from other sources as the Act permits. We will do this only if it is reasonably necessary to do so, for example, where:

- we cannot contact you and we rely on public information to update your contact details; or
- we exchange information with your representative.

When the law authorises or requires collection

The law may require us to collect personal information about you. For example, we may require your information to verify your identity under Australian Anti-Money Laundering law.

How your information may be used

We may use your information for purposes including:

- giving you information about our financial products/services;
- issuing and administering our financial products/services we provide;
- identifying you;
- telling you about other products or services we make available and that may be of interest to you, unless you tell us not to;
- telling you about other suppliers, with whom we have arrangements, that supply goods or services that may be of interest to you;
- allowing us to run our business efficiently and perform general administrative tasks;
- as required by law, regulation or codes binding us; and
- any purpose to which you have consented.

You can let us know at any time if you no longer wish to receive direct marketing offers from us. We will process your request as soon as practicable.

What happens if you don't provide information

If you do not provide your information to us, it will be difficult to perform the activities listed in this notice.

Sharing your information

General

We may use and share your information with other organisations for any purpose as described in this notice.

Sharing with your representatives

We may share your information with your representative or any person acting on your behalf (for example, financial advisers, lawyers, or power of attorneys).

Sharing with third parties

We may share your information with third parties in relation to services we provide to you or goods or services in which we reasonably consider you may be interested.

Those third parties may include:

- financial services suppliers with whom we have arrangements;
- government or regulatory bodies as required or authorised by law. In some instances, these bodies may share the information with relevant foreign authorities;
- service providers, agents, contractors and advisers that assist us to conduct our business; and
- any third party to which you consent to us sharing your information.

Sharing outside of Australia

Some of the third party service providers we use may be based in or have services located outside of Australia – including the United States of America.

Privacy Policy

You can find out more about how we manage your information by reading our Privacy Policy available at www.keyinvest.com.au.

Our Privacy Policy sets out how you can ask us to access and seek to correct information we hold about you and how you may complain against us about a privacy issue



L5, 49 Gawler Place
Adelaide SA 5000
PO Box 3340
Rundle Mall SA 5000
AFSL 240667
ABN 74 087 649 474

1300 658 904
F 08 8231 4079
info@
keyinvest.com.au

Privacy Collection Notice - November 2023

Securing
your future,
today.