

# Wealthy Self.

## Privacy Policy

### Our Commitment to Your Privacy

Wealthy Self Pty Ltd ("we," "us," or "our") is committed to protecting your privacy. We are bound by the Privacy Act 1988 (Cth) and the Australian Privacy Principles. As an Authorised Representative of Currie Pie Private Wealth Pty Ltd (AFSL 700201), we ensure your personal information is handled with the highest level of security and transparency.

### Information We Collect

To provide you with personalised financial advice, we need to collect specific information, including:

- Identity: Name, date of birth, and government identifiers (e.g., TFN, Driver's Licence, or Passport for identity verification).
- Contact Details: Email, phone number, and residential address.
- Financial Data: Income, assets, liabilities, superannuation, and investment preferences.
- Personal Circumstances: Family details, occupation, and health information (if relevant to insurance).

### How We Use Your Information

We use your data primarily to:

- Assess your financial situation and goals.
- Prepare your Statement of Advice (SOA) or Record of Advice (ROA).
- Manage your ongoing membership and review your financial plan.
- Comply with legal obligations under the Corporations Act 2001 and Anti-Money Laundering (AML) laws.

### Disclosure of Information

We may share your information with:

- Our licensee, Currie Pie Private Wealth Pty Ltd, for compliance monitoring.
- Product providers (e.g., super funds, insurers, and investment platforms).
- Your other professional advisers (e.g., accountants or solicitors) only with your consent.
- Government bodies (e.g., ASIC or the ATO) where required by law.

### Security and Retention

We take reasonable steps to protect your information from misuse and unauthorised access through secure digital storage and encryption. By law, we generally retain your financial records for seven years after our last service.

## Your Rights: Access and Correction

You have the right to request access to the personal information we hold about you or to ask for corrections if it is inaccurate. Requests are typically processed within 14–30 days.

## Complaints and Contact Information

If you have concerns about how your data is handled, please contact our Privacy Officer:

- Email: [david@wealthyself.com.au](mailto:david@wealthyself.com.au)
- Phone: 0468 554 619
- Mailing Address: 12 Indooroopilly Court, Robina, QLD 4226

If you are not satisfied with our response, you may lodge a complaint with the Office of the Australian Information Commissioner (OAIC) at [oaic.gov.au](http://oaic.gov.au) or the Australian Financial Complaints Authority (AFCA).