

## **Privacy Notice**

### **1. Introduction**

This Privacy Notice explains how personal data is collected, used, stored, and disclosed in connection with the financial services provided by Vantage Partners. It is prepared in accordance with the **Privacy Act 1988 (Cth)** and applies to all prospective, current, and former clients, including individuals associated with those clients.

### **2. Collection of Personal Information**

Vantage Partners collects personal information to meet regulatory obligations and to provide financial, accounting, and advisory services. This may include names, contact details, identification documents, employment or business information, financial records, superannuation details, and other relevant data.

Information is primarily collected directly from individuals or their authorised representatives. In some cases, data may also be obtained from public sources or third parties, where lawful and necessary. Information may be collected as part of compliance with laws such as the **Anti-Money Laundering and Counter-Terrorism Financing Act 2006 (Cth)**.

Where possible, individuals may request to remain anonymous or use a pseudonym, although this may limit Vantage Partners' ability to provide services due to legal requirements.

### **3. Use of Personal Information**

Personal information is used by Vantage Partners to provide services, meet legal and compliance obligations, manage relationships, respond to enquiries, and improve business operations.

This may include activities such as verifying identity, performing regulatory checks, administering accounts, managing correspondence, organising events, and fulfilling contractual or legal requirements. If personal information is used for purposes beyond those described, notice will be provided where required.

#### **Use of AI Tools:**

Vantage Partners may use artificial intelligence (AI) tools to support and enhance internal processes. These tools may assist with automating workflows, summarising meeting notes, generating draft communications, or transcribing meetings. Microsoft Copilot, used on Microsoft Teams, is our approved tool for recording and transcribing meetings. Its use is subject to Microsoft's [privacy policy](#) and [security measures](#).

### **4. Marketing**

Personal information may occasionally be used to send newsletters or provide updates relevant to your relationship with Vantage Partners. Individuals can opt out of receiving such communications at any time by contacting the firm.

### **5. Third-Party Services and Overseas Disclosure**

We engage third-party service providers to support the delivery of our services and overall business operations. This includes providers of software platforms, cloud storage, IT systems, and other specialist services. Some of these providers may be located overseas or may store and process personal information outside Australia.

We take reasonable steps to ensure that all external providers — whether based in Australia or overseas — have appropriate privacy and data security measures in place, consistent with Australian privacy laws.

## **6. Storage, Retention, and Disclosure**

Vantage Partners retains personal information for as long as necessary to fulfil legal, regulatory, and business purposes. Information is stored securely using appropriate physical and digital safeguards.

Personal data may be disclosed to service providers, professional advisers, regulatory authorities, and other third parties where necessary or authorised by law. All third parties handling personal information on behalf of Vantage Partners are expected to maintain confidentiality and apply appropriate data protection measures.

## **7. Access and Correction**

Individuals have the right to request access to their personal information, or to request that it be corrected if inaccurate, outdated, or incomplete. Requests must be submitted in writing, and identification may be required. A fee may apply where permitted by law.

## **8. Changes to This Privacy Notice**

This Privacy Notice may be updated periodically to reflect changes in legislation or internal practices. The most recent version will be made available upon request or published on our website.

## **9. Contact**

For any enquiries regarding this Privacy Notice, to access or correct personal information, or to lodge a complaint, please contact us on 02 9894 8884 or email [info@vantagepartners.com.au](mailto:info@vantagepartners.com.au)