

PRIVACY POLICY – WEBSITE VERSION

Synergy Financial Markets Pty Ltd (Synergy) is committed to its privacy obligations under the Australian Privacy Principles contained in the Privacy Act 1988. This Privacy Policy describes how we collect, use, disclose and protect personal information we collect about individuals who apply for or receive our services.

Personal Information

Personal information includes any information or opinion, about an identified individual or an individual who can be reasonably identified from their information. The information or opinion will still be personal information whether it is true or not and whether it is recorded in a material form or not.

The Personal Information we collect

When you apply for our services, we collect personal information about you. The personal information we collect may include:

- information provided to us on our application forms, such as your name, address, date of birth, email address, telephone number, bank account details, information about your financial situation;
- your financial details including assets and income;
- information about your transactions;
- identification documents collected under the Anti-Money Laundering and Counter Terrorism Financing Act 2006;

Sensitive Information

The collection of sensitive information is restricted by the Privacy Act. This includes information about your racial or ethnic origin, political opinions, memberships of a political association, religious beliefs or affiliations, philosophical beliefs, memberships of a professional or trade association, membership of a trade union, sexual preferences or practices, criminal record or health, genetic or biometric information.

We will not collect, use or disclose any sensitive information from you unless it is reasonably necessary to provide you with our services and you have given express consent to Synergy to do so, or the collection is required or authorised by law.

Why we collect information

Personal information is collected for the purpose of developing and establishing a financial services relationship with you. The information we collect from you will only be the information required for us to effectively perform our services and duties to you. Without your personal details we may not be able to supply these services.

How we collect personal information

Synergy collects your personal information through a variety of ways. This includes, information that you provide to us during meetings, information that you provide to us when you complete application forms, information that you provide to us over the telephone or internet, and information that you provide to us through a third party, such as your financial planner or adviser, accountant or lawyer.

Synergy does not use cookies on our website.

Use and disclosure of your information

The information we collect from you is strictly confidential for use by Synergy. Synergy may disclose personal information to third parties where you have consented to the disclosure, or to service providers contracted to Synergy under strict confidentiality clauses, including other market operators, clearers and product operators for the purpose, giving effect to your instructions.

How do we hold personal information?

The information we collect about you will be stored electronically in our Customer Relationship Management (CRM) system and only accessible by authorised personnel. We use a range of physical and electronic security measures to protect the personal information we hold. This includes identity and access management for Synergy staff, password protection, and daily back up.

Do we disclose personal information overseas?

We may disclose your personal information to recipients located outside Australia, including other Synergy affiliates and divisions.

Access to your personal information

You may request access to the personal information Synergy holds about you. To access information that is held about you please contact the Compliance Officer on +61 2 8274 2600 or email compliance@synergyfx.com.au.

Resolving your privacy complaints

If you believe a breach of your privacy has occurred or are concerned about how your personal information is being handled by us, please contact Synergy's Compliance Officer on +61 2 8274 2600. If you are unhappy with our response, there are other bodies you can contact. You may request a copy of our Privacy Policy by contacting us at the details below.

Synergy's contact details

Synergy's Compliance Officer may be contacted 9am to 5pm, Monday to Friday, except public holidays in Sydney on +61 2 8274 2600 or write to Synergy at:

Compliance Officer
Synergy Financial Markets Pty Ltd
Address: Level 27, 25 Bligh Street,
Sydney, NSW, 2000, Australia
Email: compliance@synergyfx.com.au