

Our Privacy Policy

This is the Privacy Policy of **McIntyre Legal Pty Ltd as trustee for the McIntyre Legal Trust** (ABN 63 948 915 486) ("we", "us" and when relating to us, "our").

We are committed to protecting the privacy of our contacts, customers, suppliers and employees ("you" and when relating to you, "your") and complying with the Australian Privacy Principles set out in the Privacy Act 1988 (Cth) (**Privacy Act**).

In this policy we describe how we manage your personal information.

1 THE KINDS OF PERSONAL INFORMATION WE COLLECT

The kinds of personal information that we collect include:

- contact details such as name, role or position, address, email address, mobile number, landline number and fax number;
- information about your family members, your assets, your financial circumstances, your involvement with businesses and your testamentary wishes;
- information relating to your circumstances and affairs relevant to the matter/s in which we are instructed;
- information about your legal interests and requirements and the legal services that you may wish to purchase;
- information regarding our communications with you and your attendance at seminars and promotional events held by us;
- if you are an employee or prospective employee, information about your qualifications, skills and work experience;
- if you are a supplier or prospective supplier, information about your business skills, services, products and prices.

2 HOW WE COLLECT PERSONAL INFORMATION

2.1 We collect personal information by various means including when:

- you contact us with a question or inquiry;
- you complete a questionnaire provided to you by us to assist us with advising you;
- you subscribe to our newsletter or legal updates service;
- you attend a seminar or event where we are hosting or presenting;
- you instruct us to act for you and we open a file and conduct a conflict check;
- in meetings, telephone discussions and email communications with you;
- our clients provide information relating to related and adverse parties relevant to the advice or services we are providing;
- we undertake a search or investigation; or
- you visit our website.

2.2 Where practicable, we collect personal information about you directly from you. However, we may have collected information about you from a third party such as a client, another lawyer, an accountant, a financial adviser, a third party referring you to us, a third party information provider, the courts or a person responding to our questions or inquiries.

2.3 We are required to collect the full name and address of our clients by the Solicitors Rules made under the *Legal Profession Act 2004* (NSW). Accurate name and address information must also be collected in order to comply with the trust account record keeping requirements in the *Legal Profession Regulation 2005* (NSW) and to comply with our duty to the courts.

2.4 If you are a client and do not provide us with name and address information, we cannot act for you.

2.5 If you do not provide us with accurate personal information, we may not be able to carry out our instructions or achieve the purpose for which the information has been sought.

3 THE PURPOSES FOR WHICH WE COLLECT, HOLD, USE AND DISCLOSE PERSONAL INFORMATION

3.1 We collect, hold and use personal information in order to:

- respond to your enquiries;
- provide legal services;
- employ competent and diligent personnel;
- monitor or improve the use of and satisfaction with our legal services; and
- let you know about legal developments, our expertise and legal services that may be of interest to you.

3.2 We disclose personal information:

- in order to carry out the instructions of our clients;
- respond to Court requests; and
- subject to our confidentiality obligations, when using services in support of our legal practice.

4 THE PARTIES TO WHOM YOUR PERSONAL INFORMATION IS DISCLOSED

4.1 Subject to our confidentiality obligations, we may share some relevant personal information with:

- parties related to a matter you have with us, government authorities and service providers as reasonably required to carry out your instructions;
- other professional advisers including lawyers, barristers, accountants and financial planners;
- organisations we contact on your behalf including superannuation funds, banks, and life insurance providers;
- our email marketing provider for the purposes of providing you with our newsletter, invitations and legal updates; and
- third party service providers who assist us with archival, auditing, accounting, legal, business consulting, administrative, website or technology services.

4.2 We also will disclose your information if required by law to do so or in circumstances permitted by the Privacy Act – for example, where we have reasonable grounds to suspect that unlawful

activity, or misconduct of a serious nature, that relates to our functions or activities has been, is being, or may be engaged in, in response to a subpoena, discovery request or a court order.

5 DISCLOSURE OF INFORMATION OUTSIDE THE JURISDICTION OF COLLECTION

Some of the third parties described above including our service providers and related bodies corporate may be located in countries other than Australia where you are a citizen of another country or hold assets in another country.

6 OPTING OUT OF MARKETING COMMUNICATIONS

We may, from time to time, send you newsletters, invitations and legal updates about our services. You can opt out of receiving further such communications by notifying us using our contact details below or by clicking the "unsubscribe" option at the bottom of any marketing e-mail received from us.

7 SECURITY

We take reasonable physical, technical and administrative safeguards to protect your personal information from misuse, interference, loss, and unauthorised access, modification and disclosure. For example, we maintain our files in secure offices and limit access to personal information to individuals with a need to know.

8 ACCESS/CORRECTION/UPDATING PERSONAL INFORMATION

8.1 You can contact us to access, correct or update your personal information. Unless we are subject to confidentiality obligations or some other restriction on giving access to the information and we are permitted to refuse you access under the Privacy Act, we will endeavour to make your information available to you within 30 days. Examples of circumstances where we may refuse to give you access to your personal information include where:

- giving access would be unlawful;
- we reasonably believe that giving you access would pose a serious threat to the life, health or safety of any individual or to public health or public safety;
- giving access would have an unreasonable impact on the privacy of others;
- the information could reveal the intentions of a party in negotiations;
- giving access could prejudice the taking of appropriate action in relation to unlawful activity; or

- giving access could reveal evaluative information in a commercially sensitive decision-making process.

8.2 If you request to correct your personal information, we will correct, or, if we consider more appropriate, note your request for amendment of the information on your record.

8.3 We will not charge you to make a request to access your record but we may charge you to actually provide access depending on the costs associated with obtaining and providing the material.

9 NOTIFICATION OF CHANGES

If we decide to change our Privacy Policy, we will post our revised policy on our website.

10 COMPLAINTS / CONTACT US

If a breach of this Privacy Policy occurs, a complaint may be made to us by sending it to:

*Anthea McIntyre
Legal Practitioner Director
McIntyre Legal Pty Ltd
PO Box 416
Mosman NSW 2088*

or by telephoning the Director of McIntyre Legal Pty Ltd, Anthea McIntyre, on 0481 246 647 or by sending an email to anthea@mcintyrelegal.com.au.

We will endeavour to respond to any complaint within 30 days. If you are not satisfied with our response to your complaint you may seek a review by contacting the Office of the Australian Information Commissioner using the information available at <https://www.oaic.gov.au/privacy/privacy-complaints/>.