



Privacy Policy

Beanstalk Investment Management Pty Limited (Beanstalk) is committed to respecting and protecting the privacy of its clients. Beanstalk adheres to a policy of strict confidence in relation to the protection of clients' personal information. Beanstalk manages any personal information it holds or collects according to the Australian Privacy Principles ('APPs').

What personal information does Beanstalk collect?

The primary reason your information is collected by us is to enable us to provide services to you. Generally, Beanstalk collects personal information such as your name, address, phone number, email address, date of birth, Tax File Number (TFN), bank account details and other financial information.

We may also collect personal information about your internet usage and browser history with respect to our website through the use of cookies. We may, on occasions, collect your personal information for our own promotional or marketing reasons.

How do we collect your personal information?

Beanstalk uses a number of methods for the collection of personal information. These include from the investor directly, by telephone, email or printed forms. Collection may also arise from third parties including responsible entities, trustees, entities in which you are an owner, your adviser, brokers, service providers and those you have authorised to deal with us on your behalf.

Beanstalk also collects personal information that arises through the use of our website and our use of cookies.

How do we use your personal information?

When you provide us with your personal information you are consenting to its use, disclosure and necessary handling by Beanstalk according to this privacy policy including any changes over time. This information may be used by Beanstalk to establish, manage, administer or service your investments. In the process of establishing and managing your investments, this information may be used for requisite regulatory or legislative requirements.

By providing this consent, we will also be able to deliver to you customer service and other information. This might include the distribution of marketing material, tailoring your website experience and analysing website usage trends to allow improved service to customers.

To assist us in the service of your investments, it might be necessary to disclose your personal information to third parties. These third parties might include service providers, technology services, advisers appointed by an investor, data carrying services, auditors and insurers. Your personal information may also be disclosed to those authorised by you or to those to whom you have expressly or impliedly provided your consent.

It is not likely that Beanstalk would disclose personal information to an overseas recipient. Third party providers, including administrators, may disclose your personal information outside of Australia to give effect to their service. Such disclosure of your personal information outside Australia may be to countries where there may be less stringent data protection laws. In such a case, we are unable to ensure that the overseas recipient does not breach the APPs concerning your personal information. When you provide personal information to us you consent that such information may be transferred outside of Australia.

We may use personal information, such as your email address, to send you information about our services. You can opt-out from receiving such general information from us at any time. You agree that we may still be required to send you essential information that is necessary for you to receive as part of the service provided.

How do we protect personal information?

Beanstalk takes reasonable steps to ensure that the personal information that we collect is complete, accurate, up to date and secure. It is important to note that the reality is such that data protection is never completely secure and even with the measures taken Beanstalk is unable to guarantee the security of your personal information.

You may request a copy of the personal information that we hold about you. You may also request that we erase, amend or correct that information if Beanstalk is no longer authorised to hold it.

To access, make changes or delete your personal information, or to make a complaint, please email the Privacy Officer of Beanstalk (see below).

Beanstalk Investment Management Pty Limited

Privacy Officer

Email: info@beanstalkinvestments.com.au