



## **Atlas Outsourcing respects your privacy**

### **1. Introduction**

The following is information about Atlas Outsourcing Pty Ltd's Privacy Policy and the way in which Atlas Outsourcing Pty Ltd has implemented the requirements of the Privacy Act 1988.

Protecting your personal information is important to us and is required by law. The Commonwealth Privacy Act determines that we must handle your personal information in accordance with a set of Australian Privacy Principles.

### **2. What personal information is collected and held by Atlas Outsourcing Pty Ltd?**

You have control as to what information we collect to undertake tasks.

Noting that where Atlas Outsourcing Pty Ltd is unable to collect your adviser detail and all relevant client personal information it may be difficult for us to perform the tasks as nominated by you.

Information you provide us may include but is not limited to your adviser details, your clients' names, addresses, email addresses, dates of birth, Tax File Numbers, occupation, salary information, etc.

This information is only held for the time we require it to complete the tasks as nominated by you. All data is deleted on completion of the task.

### **3. How does Atlas Outsourcing Pty Ltd collect and hold personal information?**

You are given choice as to how your details and client's personal information is collected. You may email the information, upload the information into your CRM or Atlas Outsourcing Pty Ltd Xplan Client Online Access portal. This is a cloud based Xplan portal created between you and our office and data is uploaded/downloaded from this facility. The Xplan Client Online Access portal data is stored on Australian Servers. You have the ability to remove/delete your client's personal information from your Xplan Client Online Access portal at any time.

#### **4. What are the purposes for which Atlas Outsourcing Pty Ltd collects, uses and discloses personal information?**

Your detail and client's personal information will be used by Atlas Outsourcing staff to perform various tasks as nominated by you - this may be any/all of the below:

- Fact Find into Customer Relationship Management systems
- Upload Letters of Authority / Transfers of Servicing Rights
- Comparison Tables
- Risk Pre Assessments
- Risk Quotes – Xplan
- Risk Quotes – Insurer Direct
- Application Follow Ups
- Commission Entry/Reconciliation/Reporting
- Statements of Advice
- Records of Advice
- Adviser Specific Tasks

#### **5. To whom does Atlas Outsourcing Pty Ltd disclose personal information?**

We will disclose your details as the adviser and your client's relevant personal information with the below:

Superannuation/Investment providers to perform the following tasks:

- Upload Letters of Authority
- Upload Transfer of Servicing Rights
- Comparison Table tasks
- Superannuation/Investment Application Follow Ups

Insurers to perform the following tasks:

- Upload Letters of Authority
- Upload Transfer of Servicing Rights
- Comparison Table tasks
- Risk Pre Assessment
- Risk Application Follow Ups

## **6. Is Atlas Outsourcing Pty Ltd likely to disclose personal information to overseas recipients?**

All tasks are performed by Atlas Outsourcing Pty Ltd staff located in two offices in Manila and Bangkok. Note an Australian Financial Adviser is also present in each of these offices.

It is important to note that we practice under the privacy provisions under Australian laws and not the privacy laws governed in Thailand and the Philippines.

These staff will be in receipt of your adviser details and your client's relevant personal information to perform tasks as nominated by you. By performing tasks they may need to disclose relevant information to superannuation/investment providers and insurers.

The Philippines and Thailand offices are both secure via swipe card entry and door locks. Strict policies surrounding data security arrangements include the following:

Password protect software is used to enable staff access to client websites without knowledge of client website passwords. No mobile phones and USB's are permitted to be carried or held once entered into the office. No personal websites or social media are able to be accessed. CPU USB ports are not accessible.

## **7. How can you manage your communications with Atlas Outsourcing Pty Ltd?**

From time to time we send via email an update to advisers detailing new developments, service offerings relating to Atlas Outsourcing Pty Ltd. You may elect to unsubscribe from this email at any time by sending Unsubscribe in the subject line to [info@atlasoutsourcing.com.au](mailto:info@atlasoutsourcing.com.au).

Note we do not use your details or your client personal information for marketing purposes.

You may also communicate with:

Richella Daly, Director Atlas Outsourcing Pty Ltd. She is based in Manila and can be contacted on Melbourne 03 9018 5387 or [richella@atlasoutsourcing.com.au](mailto:richella@atlasoutsourcing.com.au).

Nick Morton, Manager of Advice. Nick is based in Bangkok and can be contacted on [nick@atlasoutsourcing.com.au](mailto:nick@atlasoutsourcing.com.au).

Jason Cutrupi, Managing Director Atlas Outsourcing Pty Ltd. Jason is based in Melbourne and can be contacted on 0412 558 518 or [jason@atlasoutsourcing.com.au](mailto:jason@atlasoutsourcing.com.au).

## **8. How will Atlas Outsourcing Pty Ltd communicate changes to its Privacy Policy?**

Atlas Outsourcing Pty Ltd may change its privacy policy from time to time. We will post any changes on our privacy document available on our website [www.atlasoutsourcing.com.au](http://www.atlasoutsourcing.com.au).

## **9. How can you lodge privacy complaints?**

If you believe your data or privacy has been breached or you have a privacy complaint, you should write to:

Atlas Outsourcing Pty Ltd  
Attention: Privacy Officer  
12A The Avenue  
WINDSOR VIC 3181

or email us at: [info@atlasoutsourcing.com.au](mailto:info@atlasoutsourcing.com.au)

We will review your complaint and respond within a reasonable period of time after we receive your complaint. It is important to note that Atlas Outsourcing Pty Ltd holds Professional Indemnity and Cyber Cover insurance.