

ASKRIGHT PRIVACY POLICY

UPDATED: 29 JUNE 2023

1. PURPOSE

The purpose of this policy is to describe how AskRIGHT manages personal and sensitive information. AskRIGHT recognises that your privacy is very important, and we are committed to protecting the personal information we collect from you. The New Zealand Privacy Act 2020, The Australian Privacy Act 1988 (Cth) (Privacy Act), and the Australian Privacy Principles (APPs) govern the way in which AskRIGHT must manage your personal information and this policy sets out how we collect, use, disclose and otherwise manage personal information about you.

2. STATEMENT

2.1. The kind of information AskRIGHT collects and holds

Depending on the particular circumstances, AskRIGHT may collect and hold a range of different information about an individual. This can include a name, date of birth, contact details (including residential and/or postal address, email address, landline number or mobile telephone number), next of kin, occupation, employer, username or password for any AskRIGHT products used, and information about how an individual may use our products and services. AskRIGHT provides an information service to clients that identifies wealthy, philanthropic, and notable individuals, as well as directors of charitable entities including founders and directors of Private Ancillary Funds and Public Ancillary Funds, who might be able to assist non-profit organisations with their work. This information service includes holding some personal information gathered from public sources and/or commercial information services and/or provided by the individuals concerned. AskRIGHT collects and holds some financial information relating to banking details - such as that relating to individuals holding a paid position with the company, or any sole trader companies who supply products and services to AskRIGHT through an invoicing system. This list is not exhaustive. For example, AskRIGHT may sometimes need to collect additional information as part of a user authentication process, such as when an individual wishes to seek assistance from one of our personnel who then needs to access that individual's AskRIGHT product account (e.g. PafGUIDE®). AskRIGHT rarely collects sensitive information, except in the case of professional memberships related to the requirements of a paid position with the company.

2.2. The kind of information AskRIGHT collects and does not collect

AskRIGHT does not keep financial information (such as credit card or bank account numbers) when an individual purchases an AskRIGHT product or service. Once the transaction is processed, financial information relating to the individual is destroyed. In the event AskRIGHT required any sensitive information this would only be collected with permission from the individual and used only for the purpose it was provided.



2.3. How AskRIGHT collects personal information

AskRIGHT collects personal information in a variety of ways, including:

- ✓ Directly from the individual - such as where information is provided when a person purchases an AskRIGHT product or service from the AskRIGHT website, or contacts AskRIGHT with a query or request, or when an individual holds a paid position with the company
- ✓ From third parties - such as AskRIGHT business partners relating to professional memberships, and clients when information is provided for contact purposes
- ✓ From publicly available sources of information
- ✓ From AskRIGHT records of how an individual uses our products or services

If you access the AskRIGHT website, AskRIGHT may collect additional personal information about you in the form of your IP address and domain name. Our website may contain links to other websites. AskRIGHT is not responsible for the privacy practices of linked websites and linked websites are not subject to our privacy policies and procedures.

2.4. Purpose for collection and how AskRIGHT holds personal information

The personal information that AskRIGHT collects and holds about you depends on your interaction with us. Generally, AskRIGHT will collect, use, and hold your personal information if it is reasonably necessary for — or directly related to the performance of our functions and activities and for the purposes of:

- a. providing services to you or someone else you know;
- b. providing you with promotional material and information about other services that we, our related entities and other organisations that AskRIGHT have affiliations with, offer that may be of interest to you;
- c. facilitating our internal business operations, including the fulfilment of any legal requirements;
- d. analysing our services and customer needs with a view to developing new or improved services.

AskRIGHT may store personal information in hard copy or electronic format, in storage facilities that the company own and operate, or that are owned and operated by service providers. Any hard copy records are stored in locked cabinets at our secured head office however, very few hard copy records are now retained by the company, the majority being electronic using MS 365. The electronic facilities are secure, and password protected.

2.5. Disclosure of personal information

Personnel may have access to any non-confidential personal information that may be held by AskRIGHT (for example, a personal email address from a request for consultancy services submitted via the AskRIGHT website). AskRIGHT shall never disclose any personal information to any other

overseas entity or any third-party for commercial or other purposes that is not already available in the public domain unless required to do so by law.

AskRIGHT also discloses personal information to our customers who may not be required to comply with our privacy policy or with the Privacy Act. AskRIGHT may transfer and store personal information on cloud-based servers from time to time, which MS 365.

2.6. The right not to provide or to remove personal information

By not providing their personal information, requested individuals will still have access to the AskRIGHT website but AskRIGHT will not be able to process certain requests that require further communication such as orders and enquiries. Requests for removal of personal information are honoured as soon as practicable.

2.7. How to access or correct your personal information, or make a privacy complaint

If individuals wish to access any of their personal information held by AskRIGHT or would like to correct any errors in that information, they should contact us via email at admin@askright.com, so that we can consider and respond to the request. These contact details may also be used to notify us of any privacy complaint against us, including any belief that we have failed to align with the Privacy Principles as dictated in the Australian and New Zealand Privacy Acts or any code that has been registered under the Privacy Acts. We are committed to acknowledging your complaint in a prompt manner and will give you an estimated timeframe for when we will respond to your complaint.

AskRIGHT may decline a request for access to personal information in circumstances prescribed by the Privacy Act. and if we do, we will give you a written notice that sets out the reasons for the refusal. If AskRIGHT refuses to correct your personal information, we will give you a written notice that sets out our reasons for our refusal (unless it would be unreasonable to provide those reasons), including details of the mechanisms.

2.8. How to contact AskRIGHT

If you have any questions in relation to this statement or our management of your information, please let us know by contacting us on 1300 758 812 or 0800 577 677 (office hours are Monday-Friday 8.30 a.m.-5.00 p.m. AEST/NZST) or by writing to us at admin@askright.com. You can obtain a copy of this statement on our website www.AskRIGHT.com.

Dr. Daniel McDlarmid	Director		29 June 2023
NAME	POSITION	SIGNATURE	DATE OF LAST UPDATE