

## PRIVACY POLICY

FEB 2020

This document describes the PRIVACY POLICY of Custodia Plan Management, for the management of client information.

As part of providing a financial intermediary service, Custodia Plan Management will need to collect personal information relevant to the NDIS participant's NDIS plan.

Custodia Plan Management takes all reasonable steps to ensure the information gathered is kept securely, and to protect the interests of the participant's privacy.

Upon engagement of Custodia Plan Management's services the participant / nominated representative is required to acknowledge acceptance of the Custodia Plan Management Service Agreement for Financial Intermediary Services.

A separate service agreement is to be acknowledged and accepted for this service.

Upon acceptance of our Service Agreement we assume implied consent and understanding that we use the information you have provided with our utmost discretion in order to perform the tasks of providing our financial intermediary service.

In order to perform our service, we may need to discuss some information (for example; budgets, plan goals, and services provided etc) with other relevant parties (for example; support co-ordinators, the NDIA etc).

Custodia Plan Management takes every care to protect your information and will discuss this on a needs only basis where necessary to perform the tasks involved in providing our service.

At all other times, personal information gathered by Custodia Plan Management will remain confidential and secure except when;

- disclosure is required or authorised by law;
- it is subpoenaed by a court; or
- Custodia Plan Management believes failure to do so would place the participant at risk of harm.

Participant's/nominated representatives may amend the default consent settings in the Custodia Plan Management client file if necessary.

If you have any concerns or questions during the course of your service with Custodia Plan Management about the management of your information, please contact our Director, Pauline Luchetta at [Pauline@custodia.com.au](mailto:Pauline@custodia.com.au). Custodia Plan Management may review and update our policies and relevant documentation from time to time, without notice. When doing so the updated version will be available on our website.