

## Privacy Policy Statement

**Your Client Matters Pty Ltd** ('we', 'us', 'our') is committed to protecting the privacy of our Partners and their clients. This privacy policy explains how we collect, use, disclose and safeguard your and your clients personal information in accordance with the Privacy Act 1988 (Cwlth), the Australian Privacy Principles (APPs) and other relevant Australian laws.

### The Information we collect

We may collect the following personal information from our Partners when required for the delivery of our products and services:

- Names and contact details (including email, postal and street address, phone numbers)
- ABN, ACN
- Licence details ACL, CRN, AFSL
- Date of birth
- Company or business details
- Bank account details (encrypted for security)
- Logos, photos and signatures (for publication purposes)
- Other information required for competitions, e-marketing, market research or delivery of magazines and services

We may collect the following personal information from **the clients of our Partners** when required for the delivery of our products and services on their behalf:

- Names and contact details (including email, postal and street address, phone numbers)
- Date of birth
- Client survey responses

Where relevant, information may also be collected for specific purposes such as surveys, service customisation, analytics or to comply with legal obligations. Sensitive information (eg financial details of Partners) will only be collected with explicit consent or as required/permitted by law.

### How we collect information

Personal information may be collected directly from you, your employees, your clients or authorised representatives through:

- Online forms, agreements or website interactions
- Email, phone or in person contact
- Account registration and onboarding
- Surveys, competitions or feedback forms
- Automated means (such as cookies, analytics or e-marketing platforms)

### Purpose of collection

We collect, hold, use and disclose personal information for purposes such as:

- Delivering our products and services to Partners and their clients
- Managing subscriptions, competitions and e-marketing campaigns
- Publishing materials (with consent)
- Managing business relationships and complying with contractual obligations
- Fulfilling legal and regulatory responsibilities.

### How we use and disclose information

Personal information is only used or disclosed as necessary to provide our services or as required by law. Information may be shared with trusted third parties (such as magazine printers, IT providers, mail houses) solely for purposes connected to providing our products and services. All third party service providers must adhere to our strict privacy and data security requirements. We do not sell or make available personal or client lists to third parties for marketing outside the direct scope of our services.

### **Data security, retention and deletion**

We implement security measures to safeguard personal information against loss, misuse, unauthorised access, disclosure or destruction. Personal information is destroyed or de-identified once it is no longer required for its original purpose unless retained for legal or business record keeping.

### **Data storage and security**

We store all personal and business information on secure servers. Our systems use encryption, multi-factor authentication and role-based access controls to protect information from unauthorised access or disclosure. YCM regularly reviews its technology providers and systems as part of our information security framework. This includes the YCM proprietary partner portal, YCM Marketing Suite, Microsoft 365 and Amazon Web Services (AWS). All third-party providers are assessed against the Australian Privacy Act 1988 (Clth), the Australian Privacy Principles and the Australian Cyber Security Centre Essential Eight framework.

YCM also maintains an information security and third-party risk register that outlines how data is managed, backed up and protected. This register is reviewed annually or when significant system changes occur to ensure ongoing compliance with privacy and cyber security obligations.

### **Overseas disclosure**

Personal or client information will not be sent outside Australia without adequate protections in place unless required by law or with your informed consent. If overseas disclosure is necessary (eg for certain IT services), we will ensure data is handled in accordance with Australian privacy standards.

### **Access, correction and complaints**

You may request access to, or correction of, personal information we hold about you. Requests will be handled promptly as required by law. If you have a privacy complaint or concern, please contact us at [hello@yourclientmatters.com.au](mailto:hello@yourclientmatters.com.au)

If not resolved to your satisfaction, you may contact the Office of the Australian Information Commissioner (OAIC).

Use of the Partner client data (outside of Your Client Matters marketing system), access, corrections and complaints from Partner clients are the responsibility of the Partner and must adhere to their own privacy policy statement, data security and complaints process.

### **Changes to our policy**

This privacy policy will be reviewed and updated as required to remain compliant with laws and reflect our evolving practices. The latest version will always be available on our website or upon request.