

This document explains how Cater and Blumer Pty Ltd manages your personal information.

We are required to have a Privacy Policy pursuant to the *Privacy Act 1988* (Cth). This Privacy Policy outlines how Cater & Blumer may collect your Personal Information and how we will use, record and protect that Personal Information.

This Privacy Policy may change from time to time. This Privacy Policy was last updated in November 2024.

### **Personal & Sensitive Information**

“Personal Information” means information or an opinion about an identified individual, or an individual who is reasonably identifiable:

- a) Whether the information or opinion is true or not; and
- b) Whether the information or opinion is recorded in a material form or not.

“Sensitive Information” includes:

- a) Personal Information about an individual’s racial or ethnic origin, political opinions, membership of a political association, religious beliefs or affiliations, philosophical beliefs, membership of a professional or trade association, membership of a trade union, sexual orientation or practices and criminal record; and
- b) Health information about an individual.

### **What type of information will we collect?**

We will collect your personal information and your sensitive information, if required. This information will most likely come from you, or agents acting on your behalf, or from anyone else we request information from about you. If we ask someone else for information about you, we will ask you for your permission first.

We will collect following personal information including but not limited to:

- Full name
- Address
- Phone number
- Email address

We collect this information for various purposes, including:

1. Identifying you as our client;
2. Facilitating future communications;
3. Assessing our ability to represent you and other parties;
4. Evaluating our capacity to provide you with legal advice and services;
5. Provision of legal services; and
6. Conducting accounting and marketing activities to ensure effective business management.

In addition, we may collect sensitive information relevant to your case, which may include:

- Medical information
- Financial information
- Tax information
- Cultural or family background
- Political, religious, or philosophical beliefs
- Membership in any trade or profession

- Criminal record or history
- Information about assets you own, have owned, or intend to own

We will only collect sensitive information when it is reasonably necessary to provide you with legal advice and to address the matters you have instructed us on.

If we seek out information about you, we will comply with all applicable Australian Privacy Laws.

## **What about unsolicited information?**

We may occasionally receive unsolicited information about you from various sources, including:

1. An entity claiming to act as your agent;
2. Information received via telephone, facsimile, email, in-person meetings, or through our website and social media channels;
3. Another party (such as a separate party relating to your matter); or
4. Details from the electoral roll.

If we receive unsolicited information, we will, if necessary, seek to verify its accuracy with you in accordance with Australian Privacy Laws.

## **What if I want to stay anonymous?**

If you want to remain anonymous, we are unfortunately unable to accept instructions from you. This is because we have obligations to ensure that we properly and fully identify our clients and if your matter involves other people, we will need to ensure that we are not in a position of conflict between yourself and someone else who we act for.

## **What do we do with your information?**

We do not sell your information to anyone else.

We will not disclose your information overseas.

If we do provide your information to someone, we will first ask for your permission to do so. Without your permission we will not provide you information to anyone, unless:

1. We are ordered by a Court to do so; or
2. We are required by law to disclose that information.

We would only consider providing your information to a third party in the event that the information was necessary to lessen or prevent a threat to a life, health or safety. Even then we would only do so with the express consideration of the Director Legal Practitioner of our firm.

## **What reasonable steps do we take to keep your information safe?**

We strive to keep your information safe by implementing reasonable steps and precautions to protect it from misuse, loss, unauthorised access, and unauthorised disclosure.

Our measures include:

- Educating all employees on the importance of confidentiality;
- Utilising secure usernames and passwords for our computer systems;
- Employing anti-virus software;
- Ensuring secure storage of archived information.

We are committed to maintaining the security and confidentiality of your information.

## **How do we hold your information?**



We maintain some of your information in writing and some within our computer system. We do use an Australian cloud storage system.

Records held in our computer system are password protected and backed up on a system located in New South Wales. Access to this system is restricted to our employees and, on occasion, to Australian-based computer technicians who are contractually obligated to maintain confidentiality.

We retain written records until your matter is completed. Once your matter concludes, most written records are converted into digital copies and the written records destroyed. Written records are destroyed through shredding.

Certain written records may be held in our Safe Custody System. If this is the case, you will be notified in writing. These records will be retained indefinitely, in accordance with the Legal Profession Act, the New South Wales Law Society guidelines, and your instructions. Access to these records is limited to our employees.

You may collect these documents at any time during your lifetime, provided we can verify your identity. After your passing, these documents will become part of your Estate.

**What if the information we hold is incorrect?**

If you believe that the information we have collected about you is incorrect, please advise us immediately. You can request access to your information at any time by contacting the person you have been dealing with or any of our employees. Often, a simple phone call to our office will suffice to correct any inaccuracies.

If you have a privacy complaint, we encourage you to let us know! Please direct your complaint to our Client Engagement Manager. Upon receiving your complaint, we will provide a written response as soon as practicable, but usually within 30 days.

You can submit your complaint using one of the following methods:

By email: [leeton@caterandblumer.com.au](mailto:leeton@caterandblumer.com.au) or [griffith@caterandblumer.com.au](mailto:griffith@caterandblumer.com.au)

By telephone: (02) 6955 5500 (Leeton) or (02) 6966 7700 (Griffith)