

CLIENT INFORMATION REQUEST

INSTRUCTIONS

- Please provide details below of the types of information you seek to access or update and the entity(ies) within Equity Trustees that hold that information
- There is usually no charge associated with making a request to access personal information. However in some cases there may be a charge to cover the time we spend locating, compiling, explaining and providing the information in the required format. If there is a charge, we will give you an estimate and confirm that you wish to proceed with the request.

SECTION 1 – PROVIDE THE FOLLOWING

Type of request:

Please select the option which best describes your request

Access

Rectification

Deletion

Portability

Other

In what capacity are you making the request:

Please select the best option which describes the requestor type

Client

Authorised Representative

Guardian

Please provide:

PERSONAL INFORMATION SOUGHT

ENTITY/PRODUCT/ACCOUNT OR MEMBER NUMBER DETAILS

If not a request to access personal information please provide the reason for the request



Additional details

SECTION 2 – PLEASE PROVIDE CONTACT DETAILS SO THAT WE CAN DISCUSS YOUR REQUEST, VERIFY YOUR IDENTITY AND SEND YOU INFORMATION

First name	<input type="text"/>
Last name	<input type="text"/>
Email address	<input type="text"/>
Current address	<input type="text"/> <input type="text"/>
Phone number	<input type="text"/>
Signature	<input type="text"/>
Date	<input type="text"/>

We try to provide you with the information you have requested within 30 days. We'll need to verify your identity before completing your request.

In certain circumstances we are allowed to refuse or limit the access we provide. If so, we will let you know in writing of the reasons for refusing your request.

Email this form to: privacy@egt.com.au

Post this form to: Equity Trustees Ltd
Attention: Privacy Officer
GPO Box 2307
Melbourne
VIC 3001