



Privacy Policy

OFFICE

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CONTACT

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LOCATIONS

Rockhampton · Yeppoon · Brisbane

South Geldard Lawyers (referred to in this Privacy Policy as “us”, “we”, or “our”) are committed to complying with the *Privacy Act 1988* (Cth) in relation to the personal information we may collect from you.

This Privacy Policy sets out how we collect, use, disclose and manage personal information and may be varied or modified by us, in our sole discretion, without notice to you.

You should frequently review this Privacy Policy. We will deal with your personal information in accordance with the *Privacy Act 1988* (Cth), the Australian Privacy Principles and the most recent version of this Privacy Policy published at www.southgeldard.com.au.

COLLECTION OF PERSONAL INFORMATION

We may source and hold personal information about you that is relevant to providing you with the legal services you are seeking. We may request you to supply personal information including:

- your name, gender, date and place of birth, address, telephone number, email address, facsimile number and other contact information;
- your banking details, tax file number, insurance history and other financial information;
- your business circumstances;
- your family circumstances; details about your property, assets and investments;
- other personal information relevant to providing you with the legal services you are seeking.

Your personal information will generally be collected directly from you through the use of standard forms, through a telephone conversation with you, via email or over the internet. We may also collect personal information about you from publicly available registers or agencies as well as third parties acting on your behalf.

Disclosure of personal information to us is optional. However, if you choose not to disclose personal information requested by us, or if the personal information you provide to us is incomplete or inaccurate, we may be unable to provide you with the legal services you are seeking.

USE OF YOUR PERSONAL INFORMATION

Generally, we collect, hold and use your personal information for the purposes of:

- providing legal advice and services to you or someone you know;
- responding to your requests or queries;
- maintaining contact with you;
- providing you with information about other services that we offer that may be of interest to you;
- meeting regulatory obligations and facilitating our internal business operations.

DISCLOSURE OF YOUR PERSONAL INFORMATION

Generally, we only disclose personal information about you in accordance with the purposes for which the personal information was collected.

We may however disclose your personal information to the following third parties:

- entities or persons engaged by us to perform various functions such as marketing, research and processing payments;
- entities or persons when outsourcing services, such as data storage, debt collection, delivery of products, distribution and mailing and obtaining expert help from consultants, advisers and other relevant persons (such as barristers, mediators, accountants, publishers and printers, accountants and witnesses);
- entities or persons authorised by you to receive your personal information;
- as required or permitted or required by law.

Otherwise, we will only disclose personal information to third parties with the relevant individual's consent or if the disclosure is permitted by law.

HOW WE COLLECT PERSONAL INFORMATION

Sources of information

We collect information directly from our clients, from other lawyers, government sources or public sources such as registers or the internet.

1.1 Direct Collection

Where reasonable and practicable, we collect personal information directly from you. This may occur when you:

- engage us to provide legal services;
- respond to communication with us or engage a solicitor or agent to do so;
- contact us by telephone, email, post or in person;
- complete forms or provide documents to us;
- visit our website or use our online services; or
- apply for employment with us.

1.2 Indirect Collection

We may also collect personal information about you from third parties, including:

- our client(s), where we collect information in the course of providing legal services;
- other parties to legal proceedings or transactions and their lawyers;
- witnesses of fact, expert witnesses, health care providers and hospitals;
- courts, tribunals, law enforcement and government agencies;
- publicly available sources, including public registers, websites and social media;
- referrers who introduce you to us or lead agencies and advertising sites;
- recruitment agencies and previous employers (for job applicants); and
- identity verification, commercial data brokers and background check service providers.

Why we collect personal information and how we use it

We collect, hold, use and disclose personal information for the primary purpose of providing legal services to our clients, complying with regulatory and insurance obligations and operating our legal practice.

Secondary purposes include financial management, system improvement, enforcement of our right to payment and managing the relationship between our firm and former clients once the retainer has concluded.

Collection purposes

1.1 Primary Purposes

This includes:

- providing legal advice and representation to you or to our client(s);
- managing client matters and files;
- conducting legal research and investigations;
- preparing and reviewing legal documents;
- communicating with you and other parties;
- billing and collecting fees, including pursuit of our rights under a Costs Agreement or retainer;
- complying with our legal, professional and insurance obligations; and
- administering and managing our firm.

1.2 Secondary Purposes

We may also use and disclose personal information for secondary purposes that are related to our primary purposes, including:

- maintaining and developing our relationship with you;
- quality assurance and improvement of our services, including training our AI models or those of our AI providers (subject to our obligations of confidentiality to you);
- training and professional development;
- ongoing Customer Due Diligence as required by the AML/CTF Act;
- training AI or automated systems including AI development by our vendors with appropriate confidentiality safeguards in place;
- enforcement of our right to payment of fees;
- internal reporting and analysis; and
- risk management and insurance purposes.

DISCLOSURE OF PERSONAL INFORMATION TO OVERSEAS RECIPIENTS

Your personal information may be sent overseas in order to provide the legal services you are seeking. The countries in which recipients of your personal information are likely to be located are dependent upon the specific circumstances of the engagement and the nature of the legal services you are seeking.

DATA QUALITY

We take reasonable steps to ensure that the personal information we collect is accurate, complete and up-to-date. You agree that any personal information you provide to us is accurate, complete and up-to-date.

DATA SECURITY

We store your personal information in different ways, including in paper and in electronic form.

We take reasonable steps to secure the personal information that we hold from misuse and loss and from unauthorised access, modification or disclosure by various means including electronic and physical security measures.

MANAGEMENT OF YOUR PERSONAL INFORMATION

We take reasonable steps to ensure that your personal information is managed in accordance with this Privacy Policy, the Australian Privacy Principles and the *Privacy Act 1988* (Cth).

Please contact us if you wish to request additional general information in relation to:

- the personal information we hold about you;
- the purposes for which we use personal information;
- how we collect personal information;
- to whom we disclose personal information.

ACCESSING AND CORRECTING YOUR PERSONAL INFORMATION

You have the right to access and correct personal information we hold about you (subject to certain exceptions contained in the *Privacy Act 1988* (Cth)).

If you believe that personal information we hold about you is not accurate, complete and/or up-to-date please notify us immediately using the contact details set out in this Privacy Policy. We take reasonable steps to ensure that personal information is accurate, complete and up-to-date.

If you wish to request us to provide access to personal information that we hold about you, please contact us on the contact details set out in this Privacy Policy. We will assess your request in accordance with the *Privacy Act 1988* (Cth). If we refuse your request, we will provide you with a written notice that sets out the reasons for the refusal (unless it would be unreasonable to provide those reasons).

If you make a request to access personal information that we hold about you, we may charge a fee to meet the cost of processing your request.