

## Privacy Policy and Collection Statement

This privacy statement discloses the privacy practices of BGL Corporate Solutions Pty Ltd, BGL Client Services Pty Ltd and BGL Data Services Pty Ltd (BGL Group) of Suite 2, 606 – 608 Hawthorn Road, East Brighton, Vic, 3187.

It is BGL Group's mission to build users trust and confidence as BGL Group is committed to user privacy and would like to disclose our practices.

The BGL Group will update this privacy policy and it is subject to change without prior notice. If it is changed, the changes will be posted at [www.bglcorp.com](http://www.bglcorp.com) so that you are always aware of the type of information collected, how the information may be used, and under what circumstances it may be disclosed by the BGL Group.

Please note that if at any time the BGL Group is required by law to release information about you or your organisation, BGL must cooperate fully.

## Information Collection and Use

The BGL Group is the sole owner of the information collected. We will not sell, share, or rent this information to others in ways different from what is disclosed in this statement. The BGL Group collects information from our clients and prospects via email, BGL website, BGL Client Centre, BGL Wiki forums, facsimile, telephone, mail and various web services.

### Information is collected when a prospect or client:

1. enquires about our software or services
2. purchases any of our software or services
3. provides feedback by any media
4. completes surveys or replies to expressions of interest
5. registers for BGL Group promotional events
6. registers for hands on training, update seminars or webinars
7. renews a software subscription or service subscription
8. obtains any other service or product from us
9. participates in special offers
10. logs a support call
11. accesses our Internet site
12. communicates in our Wiki forums
13. adds items to or likes items on our product wish list
14. provides feedback through our website
15. uses the Software
16. provides feedback through the Software

### Data files containing client information (and information of our clients' clients) may also be collected to:

17. assist with the resolution of software problems
18. convert data from another software package to a BGL Group software package
19. combine software data sets

## The BGL Group also collects

20. bank account data for our Bank Data Service
21. contract note data for our Contract Note Service
22. registry data for our Registry Data Service

The BGL Group also has access to data stored in our web applications Portal by BGL, Simple Fund 360, CAS 360 and Simple Ledger 360.

## What happens if you do not provide the information?

Should the relevant information not be provided, clients may be disadvantaged as they may not receive software and product updates, support calls may not be able to be resolved and information may not be provided to the correct person.

## What does BGL Group collect and how is your information used by BGL Group?

We request information from the clients to provide you with a specific service. This may include details of special offers, updates to software, details of product training courses, update sessions and webinars, newsletters, new product information and other information of interest. Information collected may be in the form of email, website submissions, facsimile, phone, face to face or mail. A client may provide information such as contact names, business name, contact number(s), facsimile number, mailing address and financial information like credit card number and expiry date, cheque or direct debit data. This information is used for billing purposes. If we have trouble processing payment, the contact information is used to contact the client.

The BGL Group uses IP addresses to analyse trends, administer our website and gather broad demographic information for aggregate use. IP addresses are not linked to personally identifiable information.

The BGL Group will send materials to clients by email, mail and facsimile. If at any time you receive material that you did not request or do not want to receive such material any more, see [Correcting and Updating Your Profile](#) below.

Data files are used by the BGL Group to resolve software problems or to convert or combine data files.

Bank account, contract note and registry data is used to provide these services to clients.

## Who does the BGL Group disclose personal information to?

The BGL Group will not sell, rent, trade or otherwise supply to third parties any personal information or data files obtained from you without your consent.\*

\* From 1 January 2017, Simple Fund 360 includes automated integration with SelfWealth Ltd, a BGL business partner. BGL has agreed with SelfWealth to automatically add new Simple Fund 360 funds to the SelfWealth platform. The SelfWealth platform is available to all BGL Simple Fund 360 clients free of charge. If you do not want your funds added to the SelfWealth platform, you can disable this function in your Simple Fund 360 software. SelfWealth's [Privacy Policy](#) states it will not share your data with any third party.

## Who does the BGL Group disclose aggregated data to?

The BGL Group may share unidentifiable aggregated demographic data with other organisations and may use the unidentifiable aggregated demographic data to provide clients with a better user experience.

## BGL Group marketing and you the customer

The BGL Group may market products and services to you that we think will benefit your business. These products and services may be from the BGL Group or from our business partners.

You have the opportunity to opt out of BGL Group marketing.

## How will BGL keep your personal information secure?

The BGL Group takes every precaution to protect our clients' information. When clients submit sensitive information via the BGL website or BGL Client Centre, information is protected both online and off-line. When our registration/purchase form asks users to enter sensitive information (such as credit card number), that information is protected.

The BGL Group has security measures designed to protect against the loss, misuse and/or alteration of the information under its control.

Client and prospect information is maintained in SugarCRM and Lotus Notes which are secured. All client information is password protected. All paper files maintained are stored securely.

All client data stored on our file servers is controlled by login names and passwords. Client data is deleted once the support issue has been resolved or the conversion or combination of data is complete.

## Changes to our Privacy Policy

If we decide to change our privacy policy, we will post those changes on our Website so our clients are always aware of what information we collect, how we use it and under what circumstances, if any, we disclose it. If at any point we decide to use personal identifiable information in a manner different from that stated at the time it was collected, we will notify users by way of an email.

Clients will have a choice as to whether or not we use their information in this different manner. We will use information in accordance with this privacy policy under which the information was collected.

Please note that if at any time BGL is required by law to release information about you or your organisation, BGL must cooperate fully.

This Privacy Policy does not apply to acts or practices of BGL that are directly related to employee records of current or former employees.

## Correcting and/or updating your profile

The BGL Group gives you the following options for accessing and modifying Information previously provided:

(a) You may gain access to Information that BGL has collected about you, by contacting our Administration Manager. We will not charge you for responding to such request, unless we incur costs in providing the information.

(b) You are able to change/update personal information through the BGL Client Centre or by obtaining a Change of Subscriber Form to change the firm's licencing details. To update contact names or email address an email can be sent to [admin@bglcorp.com.au](mailto:admin@bglcorp.com.au)

## Contacting us

If you have any questions regarding this Privacy Policy or the BGL Group's Privacy Practices, contact:

### **BGL Corporate Solutions Pty Ltd**

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