



iEXI Pty Ltd

ABN 33 654 132 813

Suite 3, Level 30, 420 George Street,
Sydney NSW 2000

Privacy Policy

Contents

| | |
|---|-----------|
| Collecting personal information | /3 |
| What personal information do we collect? | /4 |
| How do we collect your personal information? | /4 |
| Sharing your personal information | /4 |
| Accessing your personal information | /4 |
| Storing and protecting your personal information | /5 |
| How do we manage complaints? | /5 |
| About the policy | /5 |
| Contact us | /5 |

Privacy Policy

At iExtend, we are committed to protecting the privacy of all personal information we collect and handling that personal information responsibly in accordance with the Commonwealth Government's Privacy Act 1988 and the Australian Privacy Principles.

This privacy policy outlines how we collect, hold, use and disclose personal information and how it can be accessed and updated.

Within this privacy policy, "we," "our" and "us" means means iEXI Pty Ltd (iExtend) ABN 33 654 132 813 AFSL 555362 and any of its related entities, located at Suite 3, Level 30, 420 George Street, Sydney NSW 2000.

Collecting personal information

We collect personal information about you (or your client, if you are a financial adviser) to assist us in determining whether a policyholder's existing life insurance policy fits our criteria to propose a Life Co-Ownership Arrangement (the **Arrangement**) of that life policy to you (or your client, if you are a financial adviser).

We only collect personal information that is necessary for our functions or activities. This includes:

- establishing an individual's identity;
- understanding the structure and terms and conditions of an existing life policy;
- assessing that policy to determine if it fits our criteria;
- providing information to assist you (or your client if you are a financial adviser) to work with us;
- responding to enquiries and providing information about the Arrangement; and
- any other purpose identified at the time of data collection.

We always ask your permission to collect your personal information, either directly or, if you have provided permission, through a third party - such as your financial adviser. Likewise, to use and disclose your personal information, we will always ask your permission.

You can withdraw your permission at any time by contacting us, but please note that if you do not permit us to collect, use and disclose your personal information, we may be unable to offer you the Arrangement on your life policy.

What personal information do we collect?

The personal information we collect, and hold may include your name, gender, date of birth, medical history, contact details and any other information necessary to meet our co-ownership criteria.

We recognise that certain information about you is sensitive, and when we collect sensitive information about you, we will always ask for your permission to do so. This includes your medical and health information (including genetic information) and information about your lifestyle (such as smoking/alcohol consumption and exercise frequency).

How do we collect your personal information?

We usually collect your personal information from you directly. We may also collect your information from other parties. These parties include, but are not limited to, your financial adviser, your insurers, your doctors and other health practitioners and anyone else that you have provided your authorisation to deal with us.

Sharing your personal information

We may disclose your personal information to other parties, as authorised by you, including:

- insurance companies;
- your financial adviser;
- people authorised to act on your behalf;
- service providers who assist us with our life co-ownership assessment including medical practitioners, occupational medical experts and other allied health professionals; and
- other service providers who are engaged to manage, administer and undertake transactions pursuant to the Arrangement.

Accessing your personal information

Before receiving and assessing your personal information, we need to confirm your identity to protect that personal information. To do that, we may ask for appropriate proof of identification or ask you a series of identity questions.

Storing and protecting your personal information

We store your personal information in many ways, such as on secure servers and in electronic and paper form.

The security of your personal information is important to us, and we take reasonable precautions to prevent unauthorised access, modification or disclosure, loss or misuse. We have a robust security environment supported by a range of physical and digital precautions and policies that we regularly review and test. Our security measures include firewalls, encryption and secure socket layer technology.

Where we no longer require your personal information, we will take reasonable steps to destroy or permanently de-identify that information.

How do we manage complaints?

We are committed to a best practice approach in addressing privacy complaints. If you would like to make a complaint about how your personal information has been handled, do not hesitate to contact us through the 'Complaints' section of our website.

About this policy

- This policy is effective as of 2 July 2024. We will update this policy when our information handling practices change, and any amendments will apply to the information we hold at the time of the update.
- We will post the updated privacy policy on our website. We encourage you to check our website from time to time to view our current privacy policy. You can also contact us for a printed copy.

Contact us

If you have any questions about your personal information or anything else contained in this policy, please contact us on the details below:

A: Suite 3, Level 30, 420 George Street, Sydney NSW 2000
E: support@iextend.com.au