

Appendix B of the Aon Superannuation Pty Limited Privacy Policy

Third Party Disclosures			
Third Party	Information Disclosed	Reason for disclosure	Is consent required?
Administrator / Accountant	All information	Processing of benefits and contributions.	<ul style="list-style-type: none"> No consent necessary as it is disclosed for the primary purpose of collection, but sensitive information collected lists uses and disclosures.
Actuary	All personal information	Fulfilling SIS requirements and requests by the Trustee/ Company.	<ul style="list-style-type: none"> No consent necessary as it is disclosed for the primary purpose of collection.
Consultant	All information where appropriate	Requests from Trustee/Company to ensure compliance and monitor administration of Fund.	<ul style="list-style-type: none"> No consent necessary as it is disclosed for the primary purpose of collection, but sensitive information collected lists uses and disclosures.
Insurer	<ul style="list-style-type: none"> Relevant Personal Information. Sensitive Information for underwriting and claims assessment. 	Calculation of insurance premiums and payment of death and disablement claims (Note - this may include sensitive health information).	<ul style="list-style-type: none"> Consent is required for health information. When applying for insurance cover where health information is required, or applying for a disability benefit, members must consent to the information being disclosed to the administrator and insurer, otherwise the insurance/ benefit cannot be provided. Consent is not necessary for other information provided to the insurer as it is directly related to the primary purpose of collection.
Rollover Fund – Member’s Choice	Relevant Personal Information. Generally name, contact details, Eligible Service Date (ESD) and benefit amounts (split by components).	The new administrator requires this information in order to process benefits and contributions.	<ul style="list-style-type: none"> Consent is required. Members must sign a statement on the rollover authority form consenting to provide all relevant information to the rollover fund.
ATO	Name and contact details, surchargeable contributions, ESD, TFN and benefit amount (split by components).	Surcharge Reporting to meet legislation and benefits tax.	<ul style="list-style-type: none"> Consent is not required as it is required by legislation.
Non-member spouses and Family Court	Information reasonably requested within the law.	Division of Superannuation on divorce.	<ul style="list-style-type: none"> Consent is not required as disclosure is required by the Family Law and superannuation legislation.
Investment Consulting	Member investment choice.	Monitoring cashflows and asset allocation.	<ul style="list-style-type: none"> No consent necessary as it is disclosed for the primary purpose of collection.
Employer	All personal information.	For checking of data.	<ul style="list-style-type: none"> No consent necessary as it is disclosed for the primary purpose of collection.

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Financial Planners: (a) Generic flyers (b) Disclosure of information	(a) None. (b) As requested.	Marketing purposes for assistance in meeting financial goals. If we send you any information about services or products, or you do not want us to disclose your personal information to any other organisation (including related bodies corporate) you can opt out by contacting your Aon representative or by sending us a completed "Member Information Request Form."	(a) No consent required as related secondary purpose and no disclosure. (b) Consent is required.
Auditors	All personal information.	Compliance checks, taxation purposes.	■ Consent is not required as it is a directly related secondary purpose.
Medical and other Professionals	Information required to monitor ongoing claims and underwriting.	Assessment of entitlement to benefits paid or to be eligible for full insurance cover.	■ Consent is generally provided when claim is made or underwriting information is requested.
Executor and/or Beneficiaries	Death benefit payments amounts.	For payment	■ No consent necessary as it is disclosed for the primary purpose of collection
Other Government Agencies - Social Security - State Guardianship	All required information for a specific purpose.	To fulfil duties under law.	■ No consent by member but written requests by authorised people in relevant government department.
Transfer (successor fund)	All information.	Processing of benefits and contributions.	■ No consent necessary as it is disclosed for the primary purpose of collection.
Legal	All required information for a specific purpose i.e. death or TPD claim.	Provide appropriate legal advice.	■ No consent necessary as it is disclosed for the primary purpose of collection, but sensitive information collected lists uses and disclosures.
Superannuation Complaints Tribunal	All required information for a specific purpose i.e. death or TPD claim or other complaint.	For conciliation / arbitration of a member complaint.	■ No consent necessary as it is disclosed for the primary purpose of collection, but sensitive information collected lists uses and disclosures and commissioner is acting on behalf of members.
Privacy Commissioner	All required information for a specific purpose i.e. death or TPD claim and/or other complaint.	For conciliation / arbitration of a member complaint.	■ No consent necessary as it is disclosed for the primary purpose of collection, but sensitive information collected lists uses and disclosures and commissioner is acting on behalf of member.