

My Plan Manager Privacy Policy

This document describes the policy of *My Plan Manager*, for the management of client information. As part of providing a financial intermediary or support co-ordination service, My Plan Manager will need to collect personal information relevant to the NDIS participant's NDIS plan. *My Plan Manager* takes all reasonable steps to ensure the information gathered is kept securely, and to protect the interests of the participant's privacy.

Upon engagement of *My Plan Manager's* services the participant/nominated representative is required to acknowledge acceptance of the My Plan Manager Service Agreement for Financial Intermediary Services and/or Support Co-ordination. A separate service agreement is to be acknowledged and accepted for each service.

Upon acceptance of our Service Agreement we assume implied consent and understanding that we use the information you have provided with our utmost discretion in order to perform the tasks of providing our financial intermediary or support co-ordination services. In order to perform our service we may at times need to discuss some information (for example; budgets, plan goals, and services provided etc) with other relevant parties (for example; support co-ordinators, the NDIA etc). *My Plan Manager* takes every care to protect your information and will discuss this on a needs only basis where necessary to perform the tasks involved in providing our service.

At all other times, personal information gathered by *My Plan Manager* will remain confidential and secure except when;

- disclosure is required or authorised by law; it is subpoenaed by a court; or
- *My Plan Manager* believes failure to do so would place the participant at risk of harm

Participant's/nominated representatives may amend the default consent settings in the *My Plan Manager* client file if necessary.

If you have any concerns or questions during the course of your service with *My Plan Manager* about the management of your information, please contact our Director, Claire Wittwer-Smith at claire@myplanmanager.com.au

My Plan Manager may review and update our policies and relevant documentation from time to time, without notice. When doing so the updated version will be available on our website.