Client Advisory Group

Confidentiality Agreement

Version 1.0 | October 2026

1 . Purpose

As a member of the My Plan Manager Group Pty Ltd (**MPM Group**) Client Advisory Group (**Group**), you may hear personal information, experiences and opinions shared by others. You may also receive information about the MPM Group that hasn't been shared publicly.

Keeping this information private helps create a safe environment where members can share openly and contribute to discussions with confidence.

This Confidentiality Agreement (**Agreement**) explains what information should be kept confidential and each member's responsibility for protecting that information.

2 . Information that should be kept confidential

Confidential information is any information shared in connection with the Group that's not publicly available.

This may include:

- Personal information shared by members, MPM Group representatives or the Group facilitator (**Facilitator**).
- Personal stories, experiences, or opinions discussed during meetings.
- Information about MPM Group services, projects or future plans that hasn’t been publicly announced.
- Documents or other materials provided to the Group.
- Any information that the MPM Group says is confidential.

Confidential information doesn't include information that:

- Is already publicly available.
- Was already known to you before joining the Group.
- Must be shared because of a legal requirement, court order, or regulatory authority (in which case you must give the MPM Group prior written notice).
- Was independently developed by you without use of or reference to any confidential information.
- Is received by you from a third party who’s entitled to disclose it to you without restriction.

3 . Member commitments

As a member, I agree to:

- Keep confidential information shared through the Group private.
- Respect the privacy of other members, MPM Group representatives and the Facilitator.
- Only use confidential information shared through the Group for the purpose of participating in in the Group, and not for any other purpose or personal benefit.
- Store any documents or information shared with me securely.
- Not share confidential information with any person outside the Group without the prior written permission of the MPM Group.
- Ask the Facilitator if I’m unsure whether information can be shared.
- Promptly notify the MPM Group if I become aware of any actual or suspected unauthorised disclosure or use of confidential information.

4 . Information that can be shared

Members are welcome to talk generally about their involvement in the Group. However, confidential information, personal stories, meeting discussions, and materials shared with members mustn't be disclosed outside of the Group without the prior written permission of the MPM Group.

Despite the above, you may share confidential information with your professional advisers (such as your lawyer) who are bound by professional or contractual confidentiality obligations, provided you inform them that the information is confidential before disclosure and ensure they comply with obligations similar to those in this Agreement.

5 . How long this Agreement applies

This Agreement applies for the duration of your membership of the Group.

Your responsibility to keep confidential information private will continue for two years after your membership ends, unless otherwise agreed in writing by both you and the MPM Group.

6 . At the end of your membership

When you leave the Group, if requested by the MPM Group, you must return or securely delete any documents and materials containing confidential information that are in your possession or control.

7 . If confidentiality is breached

If confidential information is disclosed without permission, the MPM Group will discuss the matter with the member and take such action as it considers appropriate, including requiring the member to take steps to mitigate any harm caused.

Serious or repeated breaches may result in removal from the Group.

8 . Agreement

This Agreement is governed by the laws of South Australia, Australia. Each party submits to the non-exclusive jurisdiction of the courts of South Australia.

By participating in the Group following receipt of this Agreement, you acknowledge that you have read and understood this Agreement and agree to be bound by the obligations set out in it.