

Privacy Policy

Morgan Bentley | Privacy Policy

In this policy, “us”, “we” or “our” means Morgan Bentley (ABN 55 605 899 107) and its related bodies corporate. We are bound by the National Privacy Principles contained in the Privacy Act 1988 (Cwth) (subject to exemptions that apply to us under that Act). We may, from time to time, review and update this policy, including taking account of new or amended laws, new technology and/or changes to our operations. All personal information held by us will be governed by the most recently updated policy. This policy was last updated on 7 October 2025.

1. Privacy

Protecting your privacy and the confidentiality of your personal information is important to us, as it is fundamental to the way we conduct business. We are sensitive to privacy issues and treat very seriously the ongoing trust our customers have placed in us. Our customers trust their information to Morgan Bentley. We aspire to industry best practice procedures and believe we have systems in place for handling and protecting your private information.

2. Who is Morgan Bentley

Morgan Bentley (ABN 55 605 899 107) is a wholly owned Business Name under Sydney China Connect Pty Ltd an Australian incorporated company.

3. What is “personal information”

Personal information is any information whereby your identity may be ascertained. We generally advise that you do not publish or communicate personal information, or at least limit the personal information that you publish or communicate, to the public via our online forum services. You acknowledge that we cannot control any third-party collection or use of your Non-Confidential Information. You agree that we may use and disclose Non-Confidential Information for any purpose and by any means whatsoever.

4. How do we collect and what is the purpose for the collection of your personal information?

Where it is possible, we will collect personal information directly from you. The personal information collected and maintained by us comprises your name, address, contact details and information specific to your business needs or product or service requirements.

In some circumstances we will need to collect your personal information from third parties. Those circumstances may include, but are not limited to collection of your personal information from ASIC, the Australian Taxation Office, your employer, family, or other sources.

When you give personal information about other individuals, we and our agents rely on you to have made or make them aware:

- that you will or may provide their information to us;
- the types of third parties to whom the information may be provided;
- the relevant purposes we and the third parties will disclose it to, will use it for; and
- how they can access it.

We rely on you to have obtained their consent on these matters. If you have not done or will not do either of these things, you must tell us or our agents before you provide the relevant information. For some business and related purposes we also collect and maintain your

sensitive information. This comprises information about your taxation, business, employment, financial and associated details any or all of which could be personal and / or private.

The information requested allows us to perform our professional services for you. If we do not collect your personal information, we may not be able to do business with you.

5. How we use your personal information

In addition to the primary purpose outlined above, we may use the personal information we collect, and you consent to us using your personal information. We disclose personal information to third parties who we believe are necessary to assist us and them in providing the relevant services and products.

For example, in establishing companies, trusts or other business structures we may have to disclose your personal and other information to third parties such as vendors who provide companies and trusts, Australian Securities and Investment Commission (ASIC), the Australian taxation Office or others who we deem necessary to provide our services to you. We limit the use and disclosure of any personal information provided by us to them to the specific purpose for which we supplied it. In providing the relevant products and services to you, we may share your personal information with our related companies.

Personal information for the purposes specified above may be shared on a confidential basis with:

- our related body corporates;
- our distributors and agents;
- government agents;
- data collection and verification agencies;
- legal advisors;
- actuaries and accountants;
- contracted advisors and service providers;
- professional and other organisations;
- your employer;
- other parties as required by law and/or the agent of any of these.

6. Direct marketing and your privacy

From time to time we may advise or offer you information on our other products or services that may be relevant and of interest to you. If you do not wish to receive these offers or information, please contact us by email to info@morganbentley.com.au

7. Accessing and updating your information and how to contact us

We aim to ensure that your personal information is accurate, up to date and complete. Please contact Morgan Bentley to update your personal details by email to info@morganbentley.com.au if you would like to have access to, revise your personal information or feel that the information we currently have on record is incorrect or incomplete.

8. Website Privacy Statement

While using our internet websites you may provide us with personal information. We will use all reasonable measures to protect any such information from being used for any other purpose other than the provision of our services as detailed herein.

8.1 Data transmitted over the Internet

We have robust and secure internet facilities however, as good as they are, no data transmission over the Internet can be guaranteed as totally secure. We try to protect such information, but we cannot ensure or warrant the security of any information you transmit to us or from our online products or services and you do so at your own risk. Once we receive your transmission, we take reasonable steps to preserve the security of the information in our own systems. If you decide to complete an online application form, the information that you enter the online form will only be collected by us if you submit your online application. If at any stage you cancel your application prior to submitting your application, the information you have entered up to that point will be automatically deleted.

9. Advertising and tracking

We may collect information about your visit to our site to assist us with measuring and improving our website. Examples of information that we collect include day and time of your visit, whether you have visited our website previously, whether you used a search engine to find us and some geographical information about what country and state you are in.

We use methods to collect visitor information so that we can better understand how to improve our products and services to you. One of the primary methods used by this tool is the placement of cookies. Cookies are small information files that an end user's Web browser places on that user's computer when a website is visited. For information on disabling these cookies, please go to the privacy settings section within your browser. In addition to the session cookie, we may use other data collection methods such as appending query strings to an image request.

We also use other external companies for the following purposes:

For webhosting services for this website,

To gather non-personal information (using cookies) in order to evaluate the effectiveness of online marketing activities, for example.

10. Email

We will retain the content of any e-mail that you send us, if we believe that we have a legal requirement to do so. Your e-mail message content may be monitored by our employees for security issues including where e-mail abuse is suspected; our response to you may be monitored for quality assurance issues.

10.1 Spam

Spam means unsolicited advertising material sent via email. We do not send this type of communication. If you have provided your email address to us we may however use this to promote our products, where you have indicated your permission to do so. If you receive an email from us at any time and no longer wish to receive this type of communication, you can forward an email, including the Morgan Bentley email address from which you received your

email, to info@morganbentley.com.au We will then remove your email address from our records within 5 business days of receiving your instructions.

11. Site linking policy

We may include links to external sites that we consider contain information relevant to the information that you were seeking with us. Where these links occur, we accept no responsibility for the accuracy of the content of those sites or your reliance on any information contained within any such site.