



ABN: 88 922 489 839 | Queensland, Australia | Effective: July 2026

SOLARA CONSULTING SERVICES

Privacy Policy

Solara Consulting Services (ABN 88 922 489 839) is committed to protecting the privacy of individuals whose information we collect and handle. This Privacy Policy sets out how we collect, use, disclose, and protect personal information in accordance with the Privacy Act 1988 (Cth) and the Australian Privacy Principles (APPs).

1. Who we are

Solara Consulting Services is a sole trader business operated from Queensland, Australia, providing financial services consulting (paraplanning support) and technology consulting to Australian businesses and licensed financial advisers.

2. What personal information we collect

We may collect the following types of personal information in the course of providing our services:

2.1 From clients (advisers and businesses)

- Business contact details (name, email address, phone number, business address)
- ABN and business registration details
- Billing and payment information
- Correspondence and instructions provided during an engagement

2.2 From end-client data (financial services engagements)

Where we are engaged to prepare financial advice documentation, we may receive personal information about the adviser's clients, including:

- Full name, date of birth, and contact details

- Financial information including income, assets, liabilities, and superannuation details
- Insurance and health-related information (where relevant to advice scope)
- Government identifiers including Tax File Numbers (where provided by the engaging adviser)

We handle all end-client personal information solely for the purpose of preparing the requested documentation and in accordance with the instructions of the engaging adviser or licensee. We do not use end-client data for any other purpose.

3. How we collect personal information

We collect personal information:

- Directly from clients via email, phone, or online communication
- From documents, fact finds, and briefing materials provided by the engaging adviser
- Through our website (see section 7 - website and cookies)

4. Why we collect and use personal information

We collect and use personal information to:

- Provide the consulting services requested by our clients
- Prepare financial advice documentation on behalf of engaging advisers
- Issue invoices and manage payment
- Communicate with clients about their engagements
- Meet our legal and regulatory obligations
- Improve our services

5. Disclosure of personal information

We do not sell, rent, or trade personal information. We may disclose personal information to:

- Third-party service providers engaged to assist in delivering our services (e.g. cloud storage, accounting software), who are contractually required to handle information securely and in accordance with the APPs

- Regulatory bodies or law enforcement agencies where required or authorised by law

We do not disclose personal information to overseas recipients unless we have taken reasonable steps to ensure it will be handled in accordance with the APPs or the individual has consented.

6. Storage and security of personal information

We take reasonable steps to protect personal information from misuse, interference, loss, and unauthorised access, modification, or disclosure. Measures include:

- Secure cloud-based storage with access controls
- Password protection and two-factor authentication on systems holding personal data
- Limiting access to personal information to those who need it to perform their role

We retain personal information only for as long as necessary to fulfil the purpose for which it was collected, or as required by law. Financial advice documentation and associated records are retained for a minimum of 7 years in accordance with Corporations Act 2001 (Cth) requirements.

7. Website and cookies

Our website may collect non-personally identifiable information through cookies and analytics tools (such as Google Analytics) to understand how visitors use the site. This may include IP addresses, browser type, pages visited, and time spent on the site.

You may disable cookies through your browser settings, however this may affect the functionality of our website. We do not use cookies to collect personally identifiable information without your consent.

8. Access and correction

You have the right to request access to the personal information we hold about you, and to request correction of any information that is inaccurate, incomplete, or out of date. To make a request, contact us using the details in section 10. We will respond within 30 days. In some circumstances, we may decline a request for access or correction, in which case we will provide written reasons.

9. Complaints

If you believe we have not handled your personal information in accordance with the Privacy Act 1988 (Cth) or the APPs, you may make a complaint to us in writing. We will acknowledge receipt within 5 business days and endeavour to resolve the complaint within 30 days.

If you are not satisfied with our response, you may lodge a complaint with the Office of the Australian Information Commissioner (OAIC) at www.oaic.gov.au.

10. Contact us

For all privacy-related enquiries, access requests, or complaints, please contact:

Business name	Solara Consulting Services
ABN	88 922 489 839
State	Queensland, Australia
Email	tara@solaraconsulting.com.au
Website	www.solaraconsulting.com.au

11. Updates to this policy

We may update this Privacy Policy from time to time to reflect changes in our practices or legal obligations. The current version will always be available on our website. Continued engagement with Solara Consulting Services after an update constitutes acceptance of the revised Privacy Policy.