

Adviser Websites - MPS

Disclosures and Content Disclaimers
22 November 2017

Requirements for websites

- Approved Core Disclosures must be in a prominent location on your site and is not hidden or difficult for the public to find (usually as links from the footer on the home page or all pages)..
- Anyone visiting your site must be able to readily locate the details of your Authorised Representative status.
- All sections of the Terms and Conditions (T&C) must be included and not modified in any way.
- All Adviser websites must include the following important information:
 - Adviser Core Disclosure statement (on the home page)
 - Your current FSG (with a link from the home page)
 - A link from the home page to the Licensee's Privacy Policy. The policy may be linked to a PDF document or presented on its own web page.
 - Or insert a link to the Matrix policy via the public website here
 - Terms and Conditions (T&C) (with a link from the home page)
 - Website Content disclaimer (with a link from the home page and can be with T&C)
 - Advertising and Links to other websites disclaimer on the link area
- Before you 'go live' contact the Compliance team at compliance@matrixplan.com.au for final sign off

Individual Authorised Representative

[Advisers name, ABN XX XXX] Authorised Representative of Matrix Planning Solutions Limited ABN 45 087 470 200, AFSL & ACL No. 238256.

Corporate Authorised Representative trading as

[Advisers name], [Advisers registered or trading business name, ABN XX XXX], Corporate Authorised Representative of Matrix Planning Solutions Limited ABN 45 087 470 200, AFSL & ACL No. 238256.

Corporate Authorised Representative

[Corporate Authorised Representative Name, ABN XX XXX], Corporate Authorised Representative of Matrix Planning Solutions Limited ABN 45 087 470 200, AFSL & ACL No. 238256.

Note: Your business' ABN is compulsory on websites. It is preferred that the Corporate Authorised Representative and Authorised Representative numbers be included.

Privacy Policy

We respect your privacy and are committed to ensure that any Personal Information we collect about you is handled in accordance with the provisions of the Privacy Act 1988 and the Australian Privacy Principles and any other applicable privacy related laws. Further information on how we handle your personal information is explained in our Matrix Privacy Policy which can be accessed here [\[insert link to Matrix Privacy Policy\]](#).

Privacy Policy Hyperlink

<https://www.matrixplan.com.au/Documents/Privacy-Policy>

Website Terms and Conditions

The information provided on this website is intended to provide general information only and the information has been prepared without taking into account any particular person's objectives, financial situation or needs. Before acting on such information, you should consider the appropriateness of the information having regard to your personal objectives, financial situation or needs. In particular, you should obtain professional advice before acting on the information contained on this website and review the relevant Product Disclosure Statement (PDS). Relevant PDSs can be obtained by contacting us. No representation or warranty is made as to the accuracy, completeness or reliability of any estimates, opinions, conclusions or other information contained on this website. This website may contain certain forward-looking statements. Forward-looking statements are not guarantees of future performance and involve known and unknown risks, uncertainties and other factors, many of which are beyond our control. You should not place reliance on forward-looking statements. To the maximum extent permitted by law, we and Matrix Planning Solutions Limited disclaims all liability and responsibility for any direct or indirect loss or damage which may be suffered as a result of relying on anything on this website including any forward looking statements. Past performance is not an indication of future performance.

Website Content

The materials displayed on this site including without limitation all information, text, materials, graphics, software, advertisements, names, logos and trademarks (if any) on this site (Content) are protected by copyright, trademark and other intellectual property laws unless expressly indicated otherwise. You must not modify, copy, reproduce, republish, frame, upload to a third party, post, transmit or distribute this content in any way except as expressly authorised in writing by us or Matrix Planning Solutions Limited. You may view this site using your web browser and save an electronic copy, or print out a copy, of parts of this website solely for your own information, research or study, but only if you keep all content intact and in the same form as presented on this site (including without limitation all copyright, trademark and other proprietary notices and all advertisements). You must not use this site or the information on this site in any manner or for any purpose which is unlawful or in any manner which violates any of our rights or the rights of Matrix Planning Solutions Limited.

Advertising and Links to Other Websites

This site contains links to third party sites. These linked websites are not under our control or the control of Matrix Planning Solutions Limited (Matrix) and neither we nor Matrix is not responsible for the content of any linked website or any hyperlink contained in a linked website. Matrix provides these hyperlinks to you as convenience only and the inclusion of any link does not imply any endorsement of the linked website by us or Matrix. A link made to any such website is entirely at your own risk.

The information on this website is provided for Australian residents only, and where indicated, may be limited to specific states and territories of Australia. The law applicable to [\[insert State or Territory\]](#) will apply to this website unless other states or territories are expressly provided.

Collection of personal information

(on the same landing page)



Where the client is only signing up for receipt of an email newsletter:

Please note that by clicking submit you are consenting to the receipt of our newsletter via email from our firm.

Where the client is only signing up for the newsletter and other marketing purposes. Please ensure you edit the marketing areas which you intend to use the personal details:

Please note that by clicking submit you are consenting to the receipt of our newsletter, marketing [<insert other purposes>](#) via email/mail/phone from our firm.

Websites (on the same landing page where Financial Planning strategy, services or information is provided)



General advice warning:

The information provided on this webpage is intended to provide general information only and the information has been prepared without taking into account any particular person's objectives, financial situation or needs. Before acting on such information, you should consider the appropriateness of the information having regard to your personal objectives, financial situation or needs. Please click here [\[insert your business website link\]](#) to find out more about the services we offer.

Simplified general advice warning:

Where possible, you must include the simplified general advice warning where general advice is given. This could appear on the foot of a post that you make on social media.

This is general information and does not consider your circumstances. Before acting on such information, you should consider the appropriateness of the information having regard to your personal objectives, financial situation or needs.

Where you have related group of businesses that provide services other than financial planning services:

[Advisers Corporate Authorised Representative Name or, trading as business name], is a Corporate Authorised Representative to provide financial advice services only under Matrix Planning Solutions Limited (Matrix) ABN 45 087 470 200, AFSL & ACL No. 238256. All other services provided by [XX Group of companies] (and their related entities) are not the responsibility of, nor endorsed by Matrix and this includes related services provided by referral partners or associated professionals.