



Privacy Policy

Revised: 12/05/2026

Our Commitment

Berkshire Advisors Pty Ltd recognises that your privacy is very important. We are committed to providing our services in a secure and confidential environment.

This Privacy Policy explains:

- what personal information we may collect from you;
- how your personal information may be used;
- how your personal information is stored and protected;
- how you may access and correct your personal information;
- how privacy concerns or complaints may be handled; and
- how you can contact us.

What Information We Collect From You

Berkshire Advisors Pty Ltd may collect personal information for the purpose of providing asset recovery, entitlement tracing, probate research, genealogy research and related advisory or administrative services.

The type of information we may collect can include your name, contact details, identification information, family history details, estate or probate information, company or shareholding information, financial entitlement details, and any other information reasonably required to assist us in assessing, verifying or progressing a potential claim or recovery.

In providing these services, we may be required to collect and hold personal information in order to verify identity, confirm entitlement, correspond with relevant third parties, and comply with legal, regulatory or administrative requirements.

Failure to provide full and complete information requested may mean that Berkshire Advisors Pty Ltd is unable to properly assess, verify or assist with a potential claim or recovery.

Once we hold personal information, we will take reasonable steps to keep it accurate, complete and up to date.

Use and Disclosure

Berkshire Advisors Pty Ltd will only use your personal information for the primary purpose of providing services to you, including identifying, verifying, assessing, progressing or recovering assets, funds, entitlements, estates, shares, dividends, unclaimed monies or other related interests.

We may also use your personal information to:

- communicate with you regarding your matter;
- verify your identity or entitlement;
- conduct research relevant to a potential claim;
- liaise with registries, companies, government bodies, courts, legal representatives, accountants, financial institutions, administrators, custodians or other relevant third parties;
- maintain our internal records;
- comply with legal and regulatory obligations; and
- inform you of related services that may be relevant to you, unless you notify us that you do not wish to receive such communications.

We will only disclose personal information to third parties where it is reasonably necessary for the provision of our services, where the disclosure is authorised by you, where the disclosure is required or authorised by law, or where third parties are carrying out functions on behalf of Berkshire Advisors Pty Ltd on a confidential basis.

Security of Information

Berkshire Advisors Pty Ltd will take reasonable steps to protect personal information from misuse, interference, loss, unauthorised access, modification or disclosure.

Where personal information is no longer required, and where we are legally permitted to do so, we will take reasonable steps to destroy or permanently de-identify that information.

Access and Updating of Information

You may request access to any personal information that Berkshire Advisors Pty Ltd holds about you.

You may also request that we correct or update your personal information if it is inaccurate, incomplete or out of date.

To request access to, or correction of, your personal information, please contact Berkshire Advisors Pty Ltd using the contact details below.

Our Website and Cookies

A cookie is a small file placed on your computer or device that may contain information about your visit to a website.

Berkshire Advisors Pty Ltd may use cookies or similar technologies to assist with website functionality and to improve user experience. We do not use cookies to collect sensitive personal information about you.

If you do not wish to use cookies, you can adjust the settings on your browser to reject cookies.

Our website may contain links to other websites. Berkshire Advisors Pty Ltd is not responsible for the privacy practices or content of those external websites.

Identifiers

Berkshire Advisors Pty Ltd will not adopt as its own identifiers information that you provide to us, such as Tax File Numbers, Medicare numbers, passport numbers or driver licence numbers.

Where such information is required for identity verification or claim-related purposes, it will only be used for the purpose for which it was collected or as otherwise required or authorised by law.

Complaints and Resolution

Berkshire Advisors Pty Ltd is committed to providing a fair and responsible process for handling privacy issues.

If you have any concerns regarding privacy, please contact our Privacy Officer using the details below.

We will seek to address any concerns through our internal complaints handling process. If you are not satisfied with our response, you may refer your complaint to the Office of the Australian Information Commissioner.

How You Can Contact Us

If you have any questions or feedback about this Privacy Policy, or any privacy issues concerning Berkshire Advisors Pty Ltd, please contact:

Privacy Officer

Berkshire Advisors Pty Ltd

Email: admin@berkshireadvisors.com.au

Phone: (03) 9464 7283

Mailing Address: PO BOX 171, East Melbourne, VIC, 8002