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Cookie Policy

This Cookie Policy explains how Rounded Wealth Advisory uses cookies, pixels and similar technologies on www.roundedwealth.com.au, what they do, and how you can control them.

Issued by	Date	Version
Rounded Wealth Advisory Pty Ltd	01 September 2026	2.2



All investments involve risk, including fluctuations in market value, changes in investment income and the potential loss of some or all invested capital. Past performance is not a reliable indicator of future performance, and no investment outcome or return is guaranteed.

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This Cookie Policy explains how Rounded Wealth Advisory uses cookies, pixels and similar technologies on www.roundedwealth.com.au, what they do, and how you can control them. It forms part of our Website Terms and Conditions and should be read together with our Privacy Policy.

> **In short.** We use cookies that are essential to run our Website and keep your account secure. With your agreement, we also use analytics and advertising cookies from Google, Meta and LinkedIn to understand how our Website is used and to measure and show our ads. You can change your choices at any time.

01

About this Cookie Policy

1.1 This Cookie Policy applies to www.roundedwealth.com.au, including all of its pages, our online account application and our client portal (**Website**). The Website is operated by Rounded Wealth Advisory Pty Ltd ACN 633 327 143, ABN 32 633 327 143, AFSL 523251 (**Rounded Wealth Advisory**, **we**, **us** or **our**).

1.2 Where information collected by cookies and similar technologies is personal information, we handle it in accordance with the *Privacy Act 1988* (Cth), the Australian Privacy Principles and our Privacy Policy.

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What cookies and similar technologies are

2.1 **Cookies.** A cookie is a small text file that a website stores on your browser or device when you visit. Cookies let a website recognise your device, remember information about your visit and work properly.

2.2 **First-party and third-party cookies.** First-party cookies are set by us on our own domain. Third-party cookies are set by other organisations, such as Google, Meta or LinkedIn, whose tools we use on our Website.

2.3 **Session and persistent cookies.** Session cookies are deleted when you close your browser. Persistent cookies stay on your device for a set period, or until you delete them.

2.4 **Similar technologies.** We also use technologies that work in a similar way to cookies, including:

- **pixels and tags**, which are small pieces of code that tell a platform when you have visited a page or taken an action, such as starting an application;
- **local storage and session storage**, which let the Website store information in your browser, for example to save your application progress; and
- **email tracking**, which tells us whether an email we sent you was opened and which links were clicked.

In this policy, we refer to all of these as **cookies**.

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How we use cookies

3.1 We group the cookies we use into four categories.

3.2 **Strictly necessary cookies.** These cookies are essential for the Website to work and cannot be switched off. They:

- keep you logged in securely to our client portal and online application;
- support 2-step login, recognise trusted devices and protect against fraud, including by checking information about your device and browser, such as its operating system, browser type and settings;
- let you save your application and return to it later;
- balance traffic across our servers and keep the Website secure; and
- remember your cookie choices.

They also include cookies set by Sumsub, our identity verification provider, which are needed for its verification process to work when you verify your identity.

3.3 **Functional cookies.** These cookies remember choices you make, such as information you have entered in a form, so that we can give you a more personalised experience.

3.4 **Analytics cookies.** These cookies help us understand how visitors use the Website, such as which pages are most popular, how visitors arrive at the Website, and where they leave our application process. They collect information such as the pages you visit, how long you spend on them, how you use our calculators and forms, the type of device and browser you use, and your approximate location (worked out from your IP address). We use Google Analytics for this purpose. The information is used in aggregate to improve our Website and services.

3.5 **Advertising and social media cookies.** These cookies are set by advertising and social media platforms, including Meta (Facebook and Instagram), Google and LinkedIn, and other social media platforms we advertise on. They help us:

- measure how our ads perform, for example how many people started an application or booked a call after seeing an ad;
- show our ads to people who have visited our Website (remarketing); and
- reach people with similar interests to our visitors.

These platforms may combine the information they collect with other information they hold about you, for example if you are logged in to your account with them, and use it under their own privacy policies.

3.6 **Embedded content and linked websites.** Some pages include content or tools from other providers, such as videos, maps, our call booking tool and live chat. These providers may set their own cookies when you view or use that content. If you follow a link from our Website to another website, that website's own cookie and privacy policies apply, and we are not responsible for them.

3.7 **When cookie information becomes personal information.** Information collected by cookies does not usually identify you by name. However, if you log in to our client portal, start an application or otherwise identify yourself to us, we may link information about your use of the Website to your account. When we do, we treat it as personal information under our Privacy Policy.

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The cookies we use

4.1 The table below lists the main cookies currently used on our Website. Cookie names and durations are set by each provider and may change.

Cookie	Provider	Category	Purpose	Duration
Session and security cookies	Rounded Wealth Advisory	Strictly necessary	Keep you logged in, protect your account and save your application	Session to 30 days
Cookie consent cookie	Rounded Wealth Advisory	Strictly necessary	Remembers your cookie choices	12 months
Sumsub cookies	Sumsub	Strictly necessary	Run the identity verification process	Session
_ga	Google Analytics	Analytics	Distinguishes unique visitors	2 years
_ga_[ID]	Google Analytics	Analytics	Keeps track of your session	2 years
_gcl_au	Google Ads	Advertising	Measures how people respond to our Google ads	90 days
_fbp	Meta	Advertising	Identifies your browser to measure and deliver our Meta ads	90 days
_fbc	Meta	Advertising	Records that you arrived from a Meta ad	90 days
fr	Meta	Advertising	Delivers, measures and improves the relevance of ads	90 days
bcookie	LinkedIn	Advertising	Identifies your browser	1 year
li_sugr	LinkedIn	Advertising	Helps match your browser for ad measurement	90 days
UserMatchHistory	LinkedIn	Advertising	Syncs identifiers for LinkedIn ads	30 days
AnalyticsSyncHistory	LinkedIn	Analytics	Records when identifiers were last synced	30 days
lidc	LinkedIn	Advertising	Routes your browser to a LinkedIn data centre	24 hours

4.2 Some browsers shorten how long cookies last. For example, some browsers delete cookies set by tracking scripts after 7 days without a return visit.

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Your choices

5.1 **Our cookie banner.** When you first visit our Website, a cookie banner lets you accept or decline analytics and advertising cookies. You can change your choices at any time by selecting "Cookie settings" in the footer of our Website. Strictly necessary cookies are always active, because the Website cannot work without them.

5.2 **Browser settings.** Most browsers let you view, block and delete cookies. If you block all cookies, some parts of the Website, including our client portal and online application, will not work. You can find instructions in the help section of your browser, such as Chrome, Safari, Firefox or Edge.

5.3 **Google.** You can opt out of Google Analytics by installing the Google Analytics Opt-out Browser Add-on, and manage how Google personalises ads in My Ad Center.

5.4 **Meta and LinkedIn.** You can manage how Meta and LinkedIn use information from other websites, including ours, in the ad preferences and privacy settings of your Facebook, Instagram and LinkedIn accounts.

5.5 **Industry opt-out.** You can opt out of interest-based advertising from many participating companies through the Your Online Choices website (youronlinechoices.com.au).

5.6 **Mobile devices.** You can limit ad tracking on your phone or tablet through its privacy settings, for example by turning off ad personalisation or resetting your advertising ID.

5.7 Opting out of advertising cookies does not stop you seeing ads. It means the ads you see will be less relevant to you.

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Information shared with third parties

6.1 When advertising and analytics cookies are active, Google, Meta and LinkedIn receive information about your visit, such as the pages you view, the actions you take, your IP address, device information and cookie identifiers. These providers process this information mainly in the United States, and may also process it in other countries where they or their service providers operate.

6.2 We do not use cookies to collect your tax file number, bank account details, identity documents or the financial information you enter in our application, and we configure our tracking tools so that this information is not sent to advertising platforms.

6.3 We may also send information about actions taken on our Website, such as a completed application, directly to Meta, Google or LinkedIn from our servers (for example, through the Meta Conversions API), so that we can measure our ads more accurately. Any contact details sent in this way are converted into an unreadable coded form (hashed) first. Compliance: confirm whether server-side tracking is used; delete this clause if not.

6.4 We may also share hashed (converted into an unreadable coded form) email addresses or phone numbers of our clients and subscribers with Meta, Google or LinkedIn so that we can show our ads to them, exclude them from ads, or reach people with similar interests (custom and lookalike audiences). The platforms use this information only to match it to their users. We do not include anyone who has opted out of receiving marketing from us. Compliance: confirm whether customer list audiences are used; delete this clause if not.

6.5 Our Privacy Policy explains how we handle personal information, who we share it with and the countries where it may be held.

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Changes to this Cookie Policy

7.1 We may update this Cookie Policy from time to time, for example when we add or remove a tool or a provider changes its cookies. The updated policy will be published on our Website and takes effect from the "Last updated" date shown above.

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Contact us

8.1 If you have a question about this Cookie Policy or how we use cookies, please contact our Privacy Officer.

Email	privacy@roundedwealth.com.au
Phone	02 8880 6200 or 1300 050 090
Mail	Privacy Officer Rounded Wealth Advisory Pty Ltd L35 Tower One Barangaroo 100 Barangaroo Avenue Sydney NSW 2000

8.2 If you have a complaint about how we handle your personal information, our Privacy Policy explains how to make a complaint, and your right to contact AFCA or the Office of the Australian Information Commissioner.

Questions about this document?

Call 02 8880 6200 or 1300 050 090, Monday to Friday, 9am to 5pm AEST, or email info@roundedwealth.com.au. The current version is always available at roundedwealth.com.au.