

Your KiwiSaver Adviser:

Privacy Policy

Your KiwiSaver Adviser is committed to protecting your privacy and handling your personal information responsibly.

We collect, use and protect personal information so we can provide financial advice, ongoing KiwiSaver servicing and meet our legal and regulatory obligations.

This Privacy Policy explains how we collect, use, store and protect your personal information when you engage with us.

Collection of personal information

We collect personal information when you:

-  are referred to us by another professional
-  enquire about our services
-  contact us by phone, email or through our website
-  complete forms or provide information during the advice process
-  request ongoing servicing of your KiwiSaver
-  communicate with us throughout our ongoing relationship

How we use your information

We use your personal information to:

-  provide personalised KiwiSaver advice
-  provide ongoing KiwiSaver servicing and support
-  communicate with you about your KiwiSaver
-  complete instructions you authorise us to carry out
-  meet our legal, regulatory and professional obligations
-  improve our services, systems and client experience

Storage and security of information

We take reasonable steps to protect personal information from loss, unauthorised access, misuse, modification or disclosure.

Personal information is stored using secure cloud-based business systems and security controls designed to protect confidentiality, integrity and availability.

Our business uses secure technology platforms to support the delivery of our services. These include customer relationship management systems, document generation software, secure electronic signing platforms, cloud-based document storage and email services.

Where third-party service providers process or store personal information on our behalf, we take reasonable steps to ensure appropriate privacy and security protections are in place.

Disclosure of information

We may disclose your personal information where reasonably necessary to:

-  provide financial advice or ongoing KiwiSaver servicing
-  implement your authorised instructions with KiwiSaver providers
-  meet our legal, regulatory or professional obligations
-  engage trusted third-party service providers who support our business operations
-  comply with a lawful request from a regulator or government agency

We do not sell, rent or trade your personal information.

Technology Platforms

To deliver our services efficiently and securely, we use trusted third-party technology providers.

These platforms support activities such as document preparation, electronic signatures, secure document storage, customer relationship management, email communication and internal quality assurance.

Our current technology providers include Google Workspace (including Google Drive, Gmail, Google Forms and Google Sheets), AdviserCRM, OmniMax, Calendly and DocuSign. From time to time, we may also use other trusted technology providers that support the secure delivery of our services. Where these providers process personal information on our behalf, we take reasonable steps to ensure appropriate privacy and security protections are in place.

We only use providers that we believe maintain appropriate security standards for protecting personal information.

Access and correction

You have the right to request access to, or correction of, your personal information at any time. If you believe the information we hold about you is inaccurate or incomplete, you may request that it be corrected. Requests can be made by contacting us using the details below.

Privacy breaches

If a privacy breach occurs that is likely to cause serious harm, we will notify affected individuals and the Office of the Privacy Commissioner as required under the Privacy Act 2020. We will take steps to contain and address any breach promptly.

Changes to this policy

This Privacy Policy may be updated from time to time to reflect changes in legal or regulatory requirements or our business practices. The current version will always be available on our website.

Retention of Information

We retain personal information for as long as necessary to provide our services, comply with our legal and regulatory obligations, and meet applicable record-keeping requirements.

When personal information is no longer required, we take reasonable steps to securely destroy or permanently de-identify it.

Cookies and website

Our website may use cookies and similar technologies to improve your browsing experience and understand how visitors use our website. You can manage cookie preferences through your web browser settings.

Questions about Privacy

If you have any questions about this Privacy Policy or how your personal information is handled, please contact us:

Email: Connor@yourkiwisaveradviser.co.nz

Phone: 027 426 6669