

PRIVACY STATEMENT

1. Purpose

Russell Turner Chartered Accountants (“RTCA”, “we”, “us”, “our”) is committed to protecting your privacy and handling personal information in accordance with the Privacy Act 2020. This Privacy Statement explains how we collect, use, store, disclose and protect personal information in connection with the professional services we provide.

2. Personal information we collect

Name, date of birth and contact details; IRD numbers and tax information; bank account details; identification documents; proof of address; employment and payroll information; financial information; company, trust, partnership and ownership information; AML/CFT information; and other information reasonably required to provide our services.

3. How we collect information

We may collect information directly from you, authorised representatives, directors, shareholders, trustees, beneficiaries, partners, employees, Inland Revenue, government agencies, banks, solicitors, advisers, public sources and authorised third parties.

4. Information about other people

Clients often provide us with information about directors, shareholders, trustees, beneficiaries, partners, employees, family members and guarantors. By providing such information, you confirm you are authorised to do so and have informed affected individuals where required. Where required by the Privacy Act, we will take reasonable steps to notify individuals whose information we collect indirectly.

5. Why we collect information

To provide accounting, taxation, payroll, advisory, trust and company administration services, comply with AML/CFT obligations, manage engagements and billing, recover debts and meet legal and professional obligations.

6. Disclosure of personal information

We may disclose information to government agencies, banks, professional advisers, insurers, debt collection agencies, regulatory bodies, contractors and cloud service providers where reasonably required.

7. Overseas disclosure and cloud services

Personal information may be processed, stored or backed up by third-party service providers located both within and outside New Zealand. By engaging us, you acknowledge that information may be transferred, stored or processed in jurisdictions outside New Zealand where permitted by law.

We take reasonable steps to ensure appropriate privacy safeguards are maintained.

8. Direct marketing

We may send relevant business or tax updates. You can unsubscribe at any time.

9. Security of information

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

10. Retention of information

Client records are generally retained for at least seven years after completion of the engagement unless a longer period is required.

11. Access and correction

You may request access to or correction of personal information we hold about you.

12. Privacy breaches

We will assess and notify notifiable privacy breaches where required by law.

13. Contact details

Privacy Officer: Paul Price

Phone: (09) 438 9479

Email: admin@rtca.co.nz

You may also contact the Office of the Privacy Commissioner.

14. Changes to this Privacy Statement

We may update this Privacy Statement from time to time. The current version will be available on request and on our website.