

Privacy policy.

We are committed to protecting your privacy. This privacy statement outlines how we collect, store, use and share your personal information.

By submitting your details on this website, you consent to the use of your personal information in accordance with this privacy statement.

What information do we collect?

We may collect personal information about you, either directly from you or from other parties and we may generate information about you when we carry out our business.

The types of personal information we collect about you may include your:

- Contact information: your name, phone number, email address and postal and residential addresses.
- Documents that verify your identity and other personal details: such as your passport or drivers' licence number.
- Subscriptions/preferences: when you subscribe to receive our newsletter or updates.
- Technical information (Cookies): information about the device used to access the website or other social media sites, such as IP address, browser type, time zone settings and mobile network information.

What do we do with it?

We collect and use your personal information to provide the information and services that you request from us, and to provide you with information about other services we consider appropriate.

When necessary, we may use your information to:

- Comply with our legal and regulatory obligations (including Anti Money Laundering/Counter Financing of Terrorism compliance and audit and reporting requirements).
- Provide services and products to you and to improve the services and products that we provide to you.
- Market our services and products to you.
- Respond to communications from you.
- Improve the content on our website.

- Protect and/or enforce any legal rights and interests, including defending any claim.

We may use your personal information to communicate with you through newsletters, emails and other information such as invitations to events. You can unsubscribe if you do not wish to receive future communications.

Who do we share it with?

Besides our staff, we may share this information with third parties who enable us to provide you with our services. These include:

- Your other professional advisers
- Product providers
- Our service outsource providers such as IT consultants, custodians, etc.

We will only share your personal information with third parties where it is necessary to help us do what we collected your information for, where it is required by law or where you give us authority to.

We require these third parties to adhere to our strict confidentiality requirements for handling personal information and we seek to ensure that they comply with the Privacy Act 2020.

Where do we store it?

Our firm maintains records in both physical files and secure electronic systems. This includes the use of reputable third-party cloud storage providers located in New Zealand and Australia. We prioritize the security of your information by ensuring that our partners adhere to stringent security measures and confidentiality standards for data management.

Personal information may initially be gathered in paper format and subsequently digitized for efficiency and storage; original paper documents are then securely disposed of. We implement reasonable safeguards to protect your personal information from misuse, unauthorized access, interference, loss, and alteration.

Furthermore, we commit to responsibly disposing of or anonymizing any information that is no longer necessary for our operations.

What are my rights?

You are not obligated to provide us with your personal information. However, if you decide not to share the necessary details when requested, we may be unable to offer certain services or information to you.

You have the right to request access to any personal information we maintain about you and to seek corrections if you believe that any information is inaccurate. If you have inquiries regarding this privacy policy or wish to obtain a copy of the information we hold about you or request corrections, please reach out to us at admin@everwise.co.nz.