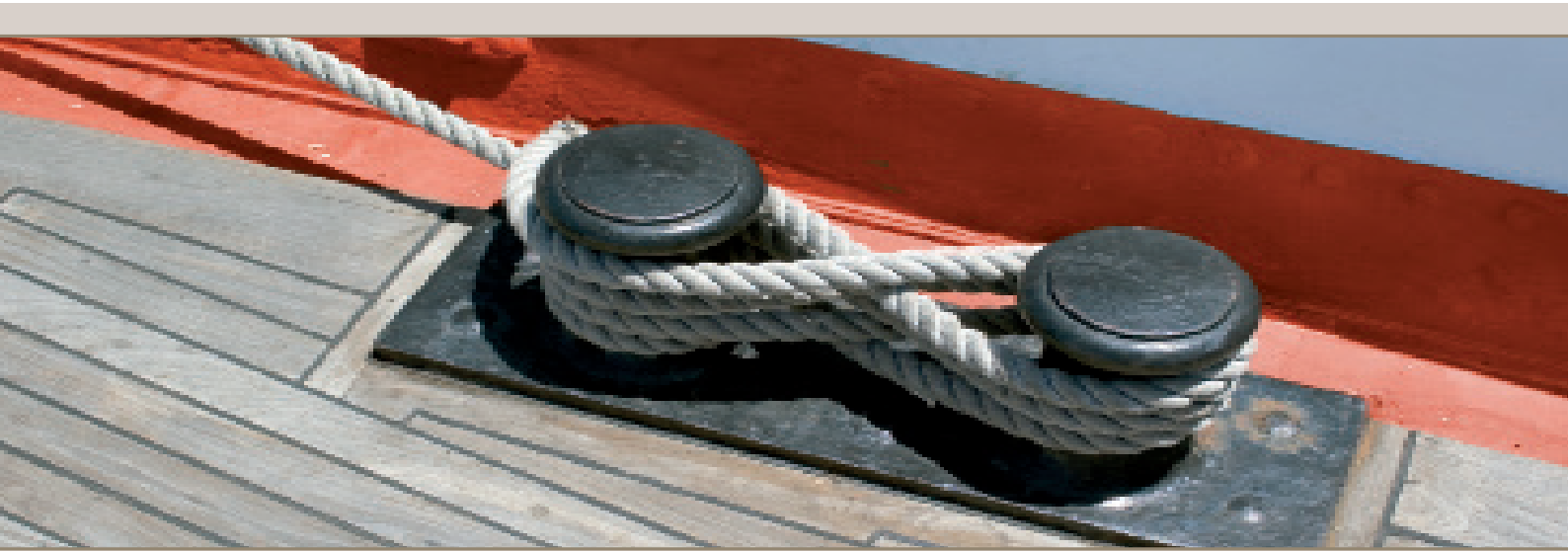




BRACKENRIDGE
FINANCIAL SOLUTIONS

Your Personal Information



We want to assure you that
personal information we hold
is kept strictly confidential
and is held securely

Your Personal Information

The Privacy Act 2020 gives you the right to request access to, and correction of, your personal information.

Brackenridge Financial Solutions collectively abides by the thirteen Privacy Principles implemented under the Privacy Act 2020 controlling how “agencies” collect, use, disclose, store and give access to personal information obtained from existing and potential clients.

What information do we collect?

Brackenridge in its dealings with you and in the provision of financial services may hold a variety of personal and sensitive information including:

- Contact details: your name, phone number, email address, address
- Your financial details: your bank account details, IRD numbers
- Documents that verify your identity, such as copy of your passport or license
- Proof of address, such as a rates or utility bill
- Employment and marital status
- Your health information
- Records of correspondence between you and Brackenridge

Brackenridge assures you this information is kept confidential and is held securely. We will not pass any of your details to another party without your express permission to do so, or unless required by law. We will take all reasonable steps to protect personal and sensitive information from misuse, loss and unauthorised access.

What do we do with it?

Information provided by you or any authorised agent, will be used by Brackenridge for the purpose of providing advice and service to you, and to provide you with information about other services we consider may be useful and appropriate.

Your information may be used by:

1. A service provider when implementing our advice.
2. A government regulator in relation to reviewing our advice or for statutory purposes such as Anti-Money Laundering / Countering Financing of Terrorism.
3. Compliance advisers, disputes resolution services, assessors or claims investigators who may need access to such information.
4. Other professionals such as solicitors, accountants, finance brokers or financial planners when their services are required to implement our advice.

Where do we store it?

Your information is stored securely on a third-party cloud-based provider, accessed only by Brackenridge Financial Solutions.

What are my rights?

You do not have to provide information to us. If you choose not to provide necessary personal information when requested, we maybe be unable to provide certain information or services to you.

You have the right to ask for a copy of any personal information we hold about you. If you have a concern about the information we hold, would like to view or change something on your file or would like more information on Brackenridge’s Privacy Policy, you can contact us as follows:

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Auckland 1011

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Victoria Street West
Auckland 1142

Phone: (09) 360 7138

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Email: rod@brackenridge.biz

Website: www.brackenridge.biz