

Six Step Financial Services Limited

Privacy Statement



We adhere to our obligations under the Privacy ACT 2020

We collect personal information from you, including information about your:

- Name
- Contact Information
- Billing Information
- Identification
- Financial Records
- Health information
- Goals and aspirations
- ID (eg drivers licence passport proof of residence etc)
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We collect your personal information in order to:

- Make an informed decision on Insurance providers
- Support applications
- Support Insurance claims
- Understand you and your circumstances



Besides our staff, we may share this information with:

- Financial Providers in order to support applications and/or claims and withdrawals or deposits and other personal requirements
- As required by law or our professional obligations, for example Government agencies with authority to audit files e.g. the Financial Markets Authority.



Providing some information is optional. If you choose not to provide personal details, we may not be able to support declarations.

We keep your information safe by storing on encrypted data base and only allow staff to access.

All paper records are destroyed by shredding.

We keep your information for the lifespan of client relationship and held for 7 years after you are no longer a client, after which it is securely destroyed.



You have the right to ask for a copy of any personal information we hold about you, and to ask for it to be corrected if you think it is wrong. If you would like to ask for a copy of your information, or have it corrected, please contact us at kay@sixstep.co.nz, or phone 03 548 2219 our office is located at 161 Tasman Street, Nelson.