

## Privacy Statement and Website privacy Policy



### **We adhere to our obligations under the Privacy ACT 2020**

We are extremely careful about protecting your privacy and confidentiality and take the Privacy Act 2020 very seriously. We also understand that all users of our website wish to know that their data will not be used for any purpose unintended by them, including accidentally falling into the hands of a third party. We collect personal information from you, including information about your:

- Name
- Contact Information
- Billing Information
- Identification
- Financial Records
- Health information
- Goals and aspirations
- ID (e.g. drivers licence passport proof of residence etc)



### **We collect your personal information for the following purposes:**

- Answer your query.
- Make an informed decision with Insurance providers.
- Support applications.
- Support Insurance claims.
- Understand your circumstances.

To give our clients the correct and very best advice we need to collect personal information from them about their financial circumstances. We understand that any information gathered for this needs analysis is personal and:

- We only collect information that is relevant to the nature and scope of the advice we are providing.
- Once collected we will protect your private and personal information.

The privacy act 2020 gives you the right to request access to and the correction of your personal information. Information provided by you to Six Step Financial or any of our authorised agents, will only be used by us and any members of our staff for the purpose of providing advice to you but may also be used by: product or service providers when implementing any of our recommendations or variations thereof including:

- applicable regulators like the financial markets authority (FMA)

- external compliance agencies or assessors or by any claims investigators who may need to access such information.
- Other professionals such as solicitors, accountants, finance brokers, financial planners when such services are required to complement this advice and only as requested by you.
- We have a formal locum agreement in place with a fully compliant FAP to provide advice in the event that a Six Step Financial Adviser is temporarily disabled.



### **Providing 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 an 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.



### **Requesting your Information**

You have the right to request the information we hold about you.

- 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](mailto:kay@sixstep.co.nz), or phone 027 548 2219 our office is located at Level 1, 207 Queen Street, Richmond, Nelson.



### **Re- Marketing**

We may re use marketing from time to time.

- This involves google, Facebook or some other supplier serving to you an advert for our services.



### **Data and Hosting**

Our website is hosted by Slightly Different Limited. We also use technology platforms hosted in countries outside New Zealand - for example email communication platforms. Accordingly, data obtained within the New Zealand may be “processed” outside New Zealand.

If you would have any question regarding Six Step’s Privacy policy, please contact us at [kay@sixstep.co.nz](mailto:kay@sixstep.co.nz), or phone 027 548 2219 our office is located at Level 1, 207 Queen Street Richmond Nelson.