

LEGAL & REGULATORY

Privacy Policy

How we collect, use, disclose and protect your personal information.

Protego Partners Limited and its associated subsidiaries and entities complies with the Privacy Act 2020 when dealing with personal information. Personal information is defined as information that may identify an individual.

At Protego Partners Limited, we care about our clients, their personal information and the accompanying services we are privileged to provide. In this policy we set out how we collect, use, disclose and protect your personal information.

What personal information do we collect?

We collect personal information from you, including:

- Name
- Contact information
- Location
- Interactions with us
- Billing or purchase information

How we use personal information

We collect your personal information in order to:

- Understand your circumstances in order to provide the appropriate service.
- Establish and manage our services.
- Allow us to communicate with you.
- Verify your identity.
- Any other use you authorise.
- Any other purpose otherwise contained in this Privacy Policy.

We are required to collect your personal information and verify your identity pursuant to the Anti-Money Laundering and Countering Financing of Terrorism Act 2009. Additionally, we may be required to maintain and report certain information pursuant to the Foreign Account Compliance Act (USA) and/or the OECD Common Reporting Standards.

Is providing personal information mandatory or voluntary?

Providing some information is optional. We will only ask you to provide personal information for the design, development and/or delivery of our services to you and, in the event that you choose not to provide any requested information for these purposes, we'll be unable to offer, advise or provide our services either generally or specifically.

Sharing of your personal information

Your personal information is collected for the purpose we collect it and may be shared, in whole or in part, for an ancillary purpose where that ancillary purpose relates to the primary purpose of collection.

When necessary and related to the purpose of the collection, we may share your personal information with and/or for:

- Any of our subsidiary and/or related companies and entities.
- Specialist advisers such as solicitors, accountants and wealth managers.
- Electronic identification providers.
- Our information technology partners and platforms.

Access and correction of your personal information

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'd like to ask for a copy of your information, or to have it corrected, please contact us at email@protego.nz.