

Privacy Policy

Norrie & Daughters

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Privacy Policy

Introduction

This document sets out Norrie & Daughters Privacy Policy as applicable to all assignments.

Why Norrie & Daughters collects personal information about you

As an accounting firm, we need to collect, hold, use and disclose your personal information as part of providing our products and services. We are bound by, and adhere to the privacy provisions as set out in the Privacy Act 1993

In order to commence an engagement assignment where individuals are involved, we need to know about the people we are working for and what their connection is to another entity such as a company or a trust that is also a customer of ours. We also need to fulfil our obligations under the Anti-Money Laundering and Countering Financing of Terrorism Act 2009 (**AML/CFT**)

In restructuring and insolvency assignments and trust assignment we will also collect personal information about shareholders, directors, creditors, beneficial owners or beneficiaries and other interested parties so that we can carryout the assignment and to comply with our AML/CFT obligations.

Information About You

The information that we may collect about you includes:

- ◆ legal name and any name you go by;
- ◆ physical address;
- ◆ other contact information;
- ◆ geographical location;
- ◆ computer and/or network details;
- ◆ interactions with us;
- ◆ bank account details;
- ◆ tax number and tax details;
- ◆ financial information;
- ◆ billing and purchasing information;
- ◆ identity documents necessary to prove your identity as required under our AML/CFT Policy

How we collect and use your personal information:

Wherever personal information is provided to us whether it's in our offices, online or over the phone, we'll do everything we can to protect it from being used in the wrong way.

Protection of Personal Information

We use the latest third-party technologies to ensure the integrity of our server and electronic communications between our server and off-site backups, our internal computer networks electronic communications between a web server and a browser.

Hard records are stored in secure filing cabinets.

Confidentiality of your information:

If you are a client of ours then we will only collect, hold, use, and disclose your personal information in accordance with our Terms of Engagement or if we're required to by law.

If you are not a client of Norrie & Daughters, we will collect, hold, use and disclose information about you for the purposes for which you provided it, or if we're required to by law.

We won't disclose any personal information to any third party for purposes unconnected with the purpose for which that information was provided to us, but we may share information collected in an anonymous aggregate form.

If a person is a client of a subsidiary of Norrie & Daughters then that person consents that, that subsidiary may share that person's information with Norrie & Daughters and that the person may be added to Norrie & Daughters mailing list(s).

Sharing of Information

Besides our staff and contractors, we share this information with:

- ◆ Outside parties in order to verify the identity of our clients, directors, shareholders, creditors, trustees of a trust, beneficiaries and beneficial owners. Outside parties are normally Government Agencies within and outside of New Zealand with whom we interact with electronically to confirm your identity;
- ◆ Any credit facility provider where a client has used us as a credit reference or where we or our agents or suppliers have engaged on a client's behalf to consider providing a loan or finance under any type of financial arrangement;
- ◆ Various Government Agencies in order for us to complete our assignment. For example, the Commissioner Inland Revenue, the Registrar of Companies.
- ◆ Credit reporting agencies in order to perform credit checks upon opening an account with us;
- ◆ Any debt collection agency, other credit facility provider and with any credit reporting agency;
- ◆ Credit reporting agencies may use information disclosed by us to update their credit reporting database, and disclose any information that they hold about you to their own customers, as permitted under the Credit Reporting Privacy Code.

Note: Where an account with us is overdue for more than 30 days overdue we may list a credit default against the debtor with any credit reporting agency or refer the debt to a debt collection agency.

Location of Personal Information

Your information is collected and held by Norrie & Daughters at 136 Broadway, Newmarket, Auckland 1023, PO Box 9596 Newmarket, Auckland 1149.

Under the Privacy Act, you're entitled to see and request the correction of any personal information about you held by us. You can choose not to supply the information we request but it may affect our ability to accept you as a client.

Accuracy of information and asking for or correcting personal information:

We try to make sure that any personal information we hold is accurate. To help us do this, please let us know as soon as you can about any changes in your personal details (including your residential or email address, or telephone or facsimile numbers). Please call us on 09 551 3631 or email us at admin@norrie.co.nz to change your personal information.

Communications:

By providing us with an email address or personal information online, whether via online form, social media such as Facebook or WeChat, or by sending us an email, then that person agrees to us:

- a) collecting, using, sharing and storing their personal information for the purposes it was provided it; and
- b) contacting that person via email, text message, online notification (with or without an unsubscribe facility) telephone, or post, in regard to that persons specific request or instructions or for marketing purposes in which case an unsubscribe function will be provided.

Cookies:

A 'cookie' is a small text file placed on your device by a website to capture information about your visit. We use cookies for a number of purposes.

In most circumstances, you can adjust the settings on your browser to notify you when you are offered a cookie and decide whether or not to accept it.

Analytics and other technologies we use:

Norrie & Daughters and/or its related companies use Google Analytics and other tracking software (cookies) throughout our website. These provide us with anonymous information about the use and effectiveness of our website, covering multiple sessions across multiple devices.

We may combine information collected from your use of the www.norrie.co.nz website with other information we hold about you, including personal information.

We also use other tracking software to understand and optimise user experience and to improve our advertising both on and outside our website(s), including but not limited to Google Remarketing and Facebook Remarketing.

External websites:

Where our website contains hyperlinks to third party websites, we are not responsible for the availability, content, or accuracy, or privacy practices of these websites.

How We Treat Requests for Copies of Records Containing Personal Information

When a person requests a copy of records containing their personal information we will first redact the records of all information that is not personal to the person who made the request.

Making a Complaint

In the first instance call Norrie Daughters on 09 551 3631 and ask for the Privacy Officer or alternatively email admin@norrie.co.nz and putt Attention Privacy Officer in the subject line.

We are dedicated to resolving any complaint a person may have however if the person remains dissatisfied with the outcome of a complaint to us then they are entitled to make a complaint to the Office of the Privacy Commissioner.

Complaints to the Office of the Privacy Commissioner must involve:

- ◆ A breach of a privacy principle by us; and
- ◆ Caused the person significant harm.

The Privacy Commissioner can be contacted at: <https://privacy.org.nz>

Norrie & Daughters are committed to resolving any privacy dispute and if it becomes necessary, working with the Privacy Commissioner.