

Privacy Statement

Generation Wealth Management is committed to protecting your privacy. This privacy statement outlines how we collect, store, use and share your personal information. For more information, read our full [privacy policy](#).

By submitting your details on this website, you consent to the use of your personal information in accordance with this privacy statement.

What information do we collect?

We may collect personal information about you, either directly from you or from other parties and we may generate information about you when we carry out our business.

The types of personal information we collect about you may include your:

- Contact information: your name, phone number, email address, postal address, physical address
- Documents that verify your identity and other personal details: such as your passport or drivers' licence number
- Subscriptions/preferences: when you subscribe to receive our newsletter or updates, as well as content preferences to help us identify which material you want to receive
- Technical information: information about the device used to access the website or other social media sites, such as IP address, browser type, time zone settings and mobile network information.

What do we do with it?

We collect and use your personal information to provide the information and services that you request from us, and to provide you with information about other services we consider appropriate.

When necessary, we may use your information to:

- Comply with our legal and regulatory obligations (including Anti Money Laundering/Counter Financing of Terrorism compliance and audit and reporting requirements).
- Defend or enforce our rights - For example, to collect money owed to us.

Who do we share it with?

Besides our staff we may share this information with third parties who enable us to provide you with our services. These include:

- Your other professional advisers
- Product providers
- Our service outsource providers such as IT consultants, custodians, etc.

We will only share your personal information with third parties where it is necessary to help us do what we collected your information for, where it is required by law or where you give us authority to.

We require these third parties to adhere to our strict confidentiality requirements for handling personal information and we seek to ensure that they comply with the Privacy Act 2020.

Where do we store it?

We use third party cloud service providers to store and process the information we collect. We use BasePlate CRM services located in Christchurch. We ensure that our cloud-based service providers are subject to appropriate security and information handling arrangements and that the information stored or processed by them remains subject to confidentiality obligations.

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, and to ask for it to be corrected if you think it is wrong. If you have any questions about this privacy statement or you'd like to ask for a copy of the information we hold on you, or to have it corrected, please contact Jon Davies via email jond@generationwealth.co.nz.