

Privacy Statement for Hatton Financial Services 15th December 2021

Hatton Financial Services collects personal information from you, including information about you:

- Name
- Contact information
- Location
- Billing or purchase information
- Medical Information & Financials

We collect your personal information in order to:

- To provide information and services that you request from us
- Do something that directly relates to our business, providing you with adequate financial service and advice.

Besides our staff, we share this information with:

- an insurer or fund manager in order to implement any insurance or Kiwi Saver policy.

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.

Providing some information is optional. If you choose not to provide medical information, payslips, or business financials, we will be unable to provide the service.

We keep your information safe by storing in password protected electronic files and paper files inside an alarmed office space.

We are required by law to keep your information for seven years after **your client engagement has finished** at which point, we securely destroy it by erasing digital files and shredding any paper records.

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 theresa@hattonfinancial.co.nz, or 027 4444038, or 120 Kitchener Road, Milford, Auckland.