

# Privacy Statement

FJIF Limited, trading as Fiona Judd Investment Fiduciary Limited, takes your privacy and protecting your data seriously. I am also bound by the New Zealand Privacy Act 2020, where the privacy principals of the Act govern how I collect, use, hold and disclose your personal information.

## What information do I collect?

I collect information regarding your identity, address and financial situation. I am obligated under the Anti-money Laundering and Countering Financing Terrorism Act 2009 to confirm your identity information, your address and in some situations your applicable financial assets. If this information is withheld, I am unable to enter into a business relationship with you.

## Why do I collect personal information?

The personal information you provide to me will be collected and held by FJIF Limited, trading as Fiona Judd Investment Fiduciary Limited, in order to provide you with financial advice relevant to your situation and to meet my obligations with the relevant laws, rules and regulations.

For compliance and training purposes, I may record our phone calls, meetings and video conference calls.

## Who do I disclose your information to?

In order to provide you with my services, I must disclose relevant information to Finzo NZ Limited (my financial advice provider licence holder), my service providers and any regulatory or governmental authorities or court to the extent to which such disclosure is required to be made by applicable law or court order. Our auditors may also review any information held by us about you.

## Requesting a copy of your information

You have the right to ask for a copy of any personal information I hold about you and ask for it to be corrected if you think it is wrong. If you'd like to request a copy of your information, or have it corrected, please contact me on 027 4191 124. I will provide you with access to this information within 20 working days.

I am unable to delete your records that I am required to retain under any law.

## Retaining your personal information

I am obligated under a number of laws to retain your personal information.

It is my policy to retain client files for as long as legally possible, as it provides the record of advice we have provided. All files will be retained for a minimum period of 7 years after our business relationship has ended, unless legally required to be kept for longer.

I also manage an annual destruction process of past client files. If your client file no longer needs to be retained, it will be disposed of confidentially.

### Keeping your data secure

I take every measure to keep your data safe. I also outsource our IT security to a trusted professional in this field. They use the best IT security on the market and are constantly reviewing the latest developments in this area.

I can make changes to my Privacy Statement from time to time, and this will be available on my website. It is your responsibility to check this information.

If you have any questions about this Privacy Statement or your personal information, please contact Fiona Judd Investment Fiduciary Limited on 027 4191 124.