



Privacy policy

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This privacy policy was prepared on: 29th May 2021

It is important that you read this document

At The Money Journey Ltd, we respect and uphold your rights to privacy protection under the Privacy Act 1993. This Privacy Policy sets out why we need to collect personal information, how we collect it, what we do with it, how it is stored, and with whom we might share it with.

The information we collect

We may only collect personal information about you that is reasonably necessary for our business. The personal information we collect includes name, contact details, personal details, business details, financial information and details of products and services relevant to the work undertaken on your behalf.

You have a right to view the personal information we have collected and ask for its correction if it is inaccurate or incomplete.

Please contact me if your personal information has changed or if you believe the personal information we have is not accurate or complete.

Why we collect personal information

We collect personal information about you so as to ensure we know enough about your personal and financial situation and goals to give the best possible level of service to you relevant to the work undertaken on your behalf.

We also need to maintain your contact details for current and ongoing servicing of your requirements.

Depending on the work that you commission, we may also need to collect your personal information to fulfil our obligations under applicable laws and rules such as those relating to Anti-Money Laundering and Counter – Terrorism Financing, and to meet our professional obligations to you as a financial adviser.

How we collect personal information

Normally we only collect information about you directly from you. This can be in person, in documents you give us, from telephone calls, emails, your access to our website or from transactions that you have made or intend to make.

Occasionally we may collect information from third parties such as other advisers, or existing product and service providers but only with your permission.



How we use your information

We use personal information about you only for the purposes for which it was provided including to:

- Provide you with a quality service.
- Administer and manage our service to you.
- Communicate with you.
- Comply with our regulatory requirements.

How we store your personal information

We keep personal information in physical and electronic records at our premises or the premises of our cloud storage provider.

- Keys are required to gain access to hard copy client files.
- Soft copy records are only accessible through password-protected devices.

If the personal information we collect is no longer necessary, we delete it or permanently de-identify it.

Who we might share your information with

We do not use or disclose any personal information about you for any other purpose without your consent or unless required or authorized by law.

If you commission us to implement arrangements with third party service or product providers on your behalf, we may share sufficient personal information of yours to meet their requirements.

We do not sell your personal information for marketing purposes to other firms.

Linked websites

Our website may contain links to other websites. These links are provided for convenience only and may not remain current or be maintained. The Money Journey Ltd is not responsible for the content or privacy practices associated with linked websites.

Cookies

Our website may use cookie technology to track user traffic patterns and to better serve you when you use the website. You can set your browser to notify you when you receive a cookie, providing you with the opportunity to either accept or reject it. You can also refuse all cookies by turning them off in your browser.

Signed: *Christel Maurer*

Date: 29th May 2021