Tōtara
Wealth Management FSP561546
Independent Financial Advisers
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Privacy Statement

Totara Wealth Management Limited 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 name
- your contact information
- financial information about your personal financial circumstances
- your interactions with us based on the nature and scope of service being provided
- documents to verify your identity

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 also use your information to:

- comply with our legal and regulatory obligations (e.g., Anti-Money Laundering/Counter Financing of Terrorism compliance, reporting requirements, etc.); and/or
- defend or enforce our rights, e.g., to collect money owed to us.

Who do we share it with?

Besides our staff and the platform providers we use (e.g., MMC Wealth Administration) 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; and
- service providers who we engage, e.g., IT consultants, investment custodians, etc.
- Government agencies as required by law

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 handing personal information and we seek to ensure that they comply with the Privacy Act 2020.

Where do we store it?

All client documents are kept electronically, and original documents are destroyed by a professional document service[1].

For the most part, we use third party cloud service providers to store and process the information we collect:

- OneDrive
- Microsoft Office 365
- Advisors Assistant

[1] Hard copy client documents that contain personal information are stored at the Company's office (Level 1, 15 Bridge Street, Nelson) in a secured filing cabinet until destroyed.

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 may 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 would like to ask for a copy of the information we hold on you, or to have it corrected, please contact us at admin@totarawealth.co.nz or 03 548 9000.