



J A I M E J A M E S  
FINANCIAL & INSURANCE

## PRIVACY STATEMENT

Latest version updated 06.03.21

We adhere to the Privacy Act 2020 and its privacy principles around how we collect, handle and use personal information.

### We collect personal information from you, including information about you:

- Name
- Contact information
- Personal information (medical and financial)
- Location
- Interactions with us e.g. phone calls, emails, texts, letters, online (Teams, Zoom, Skype, Go Meeting)

Billing or purchase information (we pass this on to the Financial Institution)

- Any existing insurance policy details

### In situations where we can't collect the information from you directly, we may collect it from other people in some circumstances. For example:

- If you give us permission to collect your information
- If we are collecting the information from a publicly available source (e.g. companies office)
- If collecting the information would not prejudice your interests
- If collecting the information from you directly would undermine the purpose of collection

### We collect your personal information for its lawful purpose in order to:

- better understand your financial / medical needs and position in order to put a Financial plan in place for you
- comply with any legal, governmental or regulatory requirement on us or in connection with legal proceedings, crime or fraud prevention, detection or prosecution
- check instructions you have provided to us or to resolve dispute
- provide customer support, to improve the quality of the service we provide and to train our staff;
- keep you informed (by email, letter, phone, text or in person) of products and services we consider may be of interest to you

We only collect your information in ways which are lawful, fair and not unreasonably intrusive.

### Besides our staff, we share this information with:

- A product or service provider when implementing any of our recommendations or variations thereof
- A third party in order to take actions connected to a purpose for collection (e.g. our CRM system to store and hold your information).
- Compliance advisers, auditors or claims assessors who may need access to our files (e.g. Compliance Refinery, our disputes resolution scheme (FDRS), or the Financial Markets Authority)
- Other professionals such as solicitors, accountants, finance brokers, financial planners (when such services are required to compliment the advice as requested by you).

[www.jaimejames.com](http://www.jaimejames.com)

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**How we manage our information:**

- We keep your information safe by storing it in a safe and secure location and only allowing certain staff members to access it.
- We have secure mechanisms in place to ensure your data is kept private and to protect against loss and inappropriate access. We have a secure CRM system which is regularly backed up and stored.
- Select members of the Jaime James Financial & Insurance team have access to your information, in order for it to be readily available if you require information on your policies or the information we hold for you. If you need to update any of your information (such as your contact details), please contact us and we will do this immediately.

Providing some information is optional. If you choose not to enter certain parts of information, we'll be unable to provide specific services.

We are legally required to keep your information for seven years after you cease being a client, at which point we securely destroy your client 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:

Email: [hello@jaimejames.com](mailto:hello@jaimejames.com)

Phone: 021 527 069

Address: Level 26, HSBC Tower, 188 Quay Street, Auckland 1010