



**Jollands Callander**

*Certified Practising Accountants*

## **PRIVACY POLICY – Jollands Callander**

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This privacy policy relates to the collection, use and disclosure of information. As an accounting practice, Jollands Callander collects, uses, and discloses information for the purposes of providing accounting and business services to our clients. As such, we are bound to comply with the Privacy Act 2020 (The Act). By providing us with information, engaging us to provide you with services or by using our website, you consent to the collection, use, storage and disclosure of personal information in agreement with this Privacy Policy.

### **Collection**

The information we collect is to enable us to provide services to you and to meet our legal compliance obligations. We only collect information where it is necessary and lawful.

We may collect the following information:

- Name
- Address
- Date of Birth
- Email
- Phone number
- IRD or ACC Number
- Passport and Driver's Licence
- Any other information necessary to support us carrying out our business, services offered to you or meeting our compliance responsibilities.

We may collect personal information about you, your representatives, your clients, and others when we provide services to you. If we do, you agree to work with us to ensure that we both meet our respective obligations under the *Privacy Act 2020*. Your obligations may include ensuring your privacy policy and contracts include a reference to your collection practices, how you will use the personal information and that you may disclose the PI to an agent for public accounting services.

### **Use**

Any information we gather may be used in accordance with the Privacy Act and any other applicable law, or for the purpose of our business. This can include:

- Providing services to you and/or your representatives.
- To meet our compliance obligations for Anti-Money Laundering and Countering Financing of Terrorism Act 2009 (AML/CFT).
- Direct marketing or marketing analysis purposes (if you receive any direct marketing from us, you can opt out of this in writing via email or post).
- Billing and collecting any debt owed to us by you (may include disclosing personal information to a third party such as debt collectors).

- Specific services or purposes that we will inform you about or that you provide authorisation for.

Where possible we will collect your personal information directly from you or your representatives. We may also collect personal information from when you use the 'contact us' function on our website or personal information that is publicly available. We do not collect any other identifiable information about you when you browse the website.

If you choose not to provide certain personal information that we request, we may not be able to continue to provide services for you.

## **Disclosure**

We may disclose personal information about you to third parties both in New Zealand and overseas. We take care to ensure that other third parties outside New Zealand to whom we disclose any personal information to are subject to appropriate restrictions on their handling of that information. Personal information may be stored overseas in Australia. We may disclose your personal information to the following third parties:

- CPA Australia. For conducting a CPA Australia Best Practice Program assessment.
- Professional advisors – e.g. consultants or lawyers
- Third party service providers – e.g. Xero or data storage managers. In providing our services to you, we utilise accounting software using cloud computing provided by Xero which is based in United States, and we rely on their security measures. We also store client information in a data server managed in Albany Auckland New Zealand, which are subject to New Zealand privacy law.
- Contractors
- Regulators and Government agencies.
- Anyone else who we are legally required to or authorised to share your information with – e.g. AML/CFT requirements.
- Any other third parties we inform you about or that you give authorisation to.

## **Security and Storage**

We take reasonable steps to protect your personal information from misuse, loss or unauthorised access. The personal information we collect is held in our secure database server managed in Albany, Auckland, New Zealand. Personal information may be held in hardcopy at our office in Beachlands, Auckland. Wherever information is held we take all reasonable steps to ensure that it is secure.

## **Updating and Accessing Personal Information**

It is important that your personal information held by us is accurate, complete and up to date. It is your responsibility to ensure the information we hold about you is accurate and up to date.

If you would like a copy or wish to make any changes to your own personal information, please contact us.

### **New Products and Services**

This Privacy Policy covers any new services that may be introduced and to any new technologies we may adopt as a business, such as computer software or data storage.

### **Contact and Complaints**

Please contact us if you have any feedback, concerns, or complaints relating to your personal information at [admin@jollandscallander.co.nz](mailto:admin@jollandscallander.co.nz) or 09 479 8580 or PO Box 97 Beachlands, Auckland 2147.

### **Other**

This Privacy Policy may be reviewed and updated from time to time to reflect any changes in the law and due to any changes to our business needs.

When changes to this Privacy Policy are made, we will amend the revision date stated on the bottom of this page. This updated Privacy Policy shall be effective at the revised date.

This privacy policy was last updated August 2023.