

PRIVACY STATEMENT

This privacy statement explains how Anchored Advice Limited collects, stores, uses, and shares your personal information.

The Privacy Act 2020 requires us, to tell you certain things about the personal information we need to carry out our functions. We only collect personal information where this is necessary to carry out our functions.

The personal information we may collect from you directly includes:

- Name
- Contact Details, including address, email, and phone number.
- Interactions with us
- Documents to support applications, including Passport, IRD statements, Bank Statements, Utility Bills, Payslips, Assets & Liabilities.

We also generate personal information about you:

- Correspondence (such as letters & emails), including staff of providers.
- File notes, records of actions taken.

How we use this information:

- Establish your identity and the identity of others specified.
- Assess and respond to your requests, applications, or instructions.
- Gather evidence with your application for a home loan.
- Supporting evidence for application for Insurance

We will only disclose personal information authorised by you. Besides our staff, we share this information (on a case by case basis) with:

- Home loan providers/Banks/Other Lenders
- Insurance providers

Providing some information is optional. If you do not provide us with your personal information when requested, or you withdraw your consent for us to collect personal information or you provide us with incomplete information during the course of our relationship with you, we may no longer be able to provide you with our services.

We keep your information safe by storing it on a secure customer database and only authorised members of staff are able to access this information. All paper documents/files are scanned into our database and destroyed on site.

You have a right to ask for a copy of any personal information we hold about you, and to ask for it to be corrected.

If you would like a copy of your information, or to have it corrected please contact us at: