Privacy Statement

Privacy Statement – 1st December 2020

This is the privacy statement of Momentum Financial Limited. In this document, “we”, “our”, or “us” refer to Momentum Financial Limited.
We are Momentum Financial Limited (FSP 715151), company number (5108221) registered in New Zealand. Momentum Financial Limited is an Authorised Body operating under the license of Link Financial Group 2022 Limited (FSP 1104590).
Our registered office is at 12 Tauranga Place, Orewa, 0931. Our contact number is 021 883 995.
Our email address is malcolm@momentumfinancial.co.nz.

This privacy statement outlines how we collect, store, use and share your personal information. For more information, read our full privacy policy.

What information do we collect and what do we do with it?

We may collect personal information about you, either directly from you or from other parties. 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 use your information to:
• Comply with our legal and regulatory obligations (including Anti Money Laundering/Counter Financing of Terrorism compliance and audit and reporting requirements).
• Defend or enforce our rights - for example, to collect money owed to us.

The types of personal information we collect about you are set out below.

1. Contact information

This includes basic identification and contact information (such as your name, phone number, email address, postal address, physical address.

Momentum Financial Limited may collect personal information directly from you, including a request to find an adviser. For example, via our online forms.

2. Information you post on our website

Information you send to us by posting to a forum or blog or in your advertisement, is stored on our servers. We do not specifically use that information except to allow it to be read.

3. Note on padlock symbols and other trust marks

Some companies offer certification, an icon or other small graphic to prove to website visitors that their site is safe. The level of safety varies depending on the certification. We do not take payments via our website and have taken the decision it is not necessary.

4. Information we obtain from third parties

We do receive data from software services such as Google Analytics and others. Third party websites have their own privacy and security policies and we encourage you read them.

We collect the personal information we need to provide you with financial advice and to meet our legal obligations. Most of this information is provided directly by you.

In some cases, we may also collect personal information about you from third parties, such as product providers, public records, or other advisers involved in your financial affairs.

When this happens, the Privacy Act 2020 requires us to take reasonable steps to inform you, as soon as reasonably practicable, about what information has been collected, why we need it, how it will be used, and who it may be shared with.

We only collect information that is necessary for providing advice or meeting our regulatory requirements.

You can request access or correct your personal information at any time by contacting us.
For further information about how personal information is handled and the types of third parties involved, please refer to the Link Financial Groups Privacy Statement.

5. Content you provide to us with a view to be used by a third party

If you provide information to us with a view to it being read, copied, downloaded, or used by others, we accept no responsibility for what the third party may do with the information. We recommend you read the third-party privacy policy.

6. Cookies

Cookies are small text files that are placed on your computer's hard drive through your web browser when you visit a web site. They are widely used to make websites work, or work more efficiently, as well as to provide information to the owners of the website. For more information on how we use cookies, please click here to read our privacy policy.

7. Sending a message to our support system

When you send a message, we collect the data you have given to us in that message in order to obtain confirmation that you are entitled to receive the information and to provide you with the information. We record your request and our reply, to increase the efficiency of our business. We do not keep any personal information associated with your message, such as your name or email address.

8. Complaints

When we receive a complaint, we record personal information you have given us. We use that information to help resolve your complaint, this may include providing personal information to others, if appropriate. For example, as part of the investigation process. If we are unable to resolve your compliant through our internal complaints process, we may need to provide personal information to the external Disputes Resolution Scheme.
We may also compile statistics showing information obtained from this source to assess the level of service we provide. The information is de-identified.

9. Re-marketing

We may use re-marketing from time to time. This involves Google or some other supplier placing a tag or marker on your website in order to be able to serve to you an advert for our products / services when you visit other website.

Who do we share your information with?

Besides our staff and any related companies we may also share this information with third parties who enable us to provide you with our services.
These include:
• Your other professional advisers
• Product providers
• Our service outsource providers such as IT consultants, custodians, etc.
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 handling personal information and we seek to ensure that they comply with the Privacy Act 2020.

Where do we store it?

We use Dropbox, a third-party cloud service provider, to store and process the information we collect. 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.

Use of site by children

We do not market to children, nor do we offer products or services for sale to children. If you are under 18, you may use our site only with consent from a parent or guardian.

Disclosure to Government and their agencies

We may be required to provide information to legal authorities. We only provide personal information if they have the proper authorisation.

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 maybe 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'd like to ask for a copy of the information we hold on you, or to have it corrected, please contact us at malcolm@momentumfinancial.co.nz or on 021 883 995

This Privacy Policy was last updated in December 2020.