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Privacy Policy - Maverick Financial Services (NZ) Limited (FSP696911)

Overview

Maverick Financial Services (NZ) Limited complies with The Privacy Act 2020 when obtaining information for the purposes of providing financial advice and related services. This policy outlines the ways in which we use, collect and share your personal information.

We may collect information about you to enable us to assess your insurance needs, recommend products, and manage your policies.

Collection of Information

We may collect this information directly from you; and from third parties such as insurers, referrers, and our Financial Advice Provider (FAP), where this is necessary to provide our services

The information we collect may include identity details, financial information, health information, occupation details, residency details and existing insurance policy information.

We collect and use your information for the following purposes:

- providing financial advice and recommendations
- arranging and managing insurance products
- meeting our legal and regulatory obligations

The information collected will be held by Maverick Financial Services (NZ) Limited.

Sharing of Information

We may share your information with:

- specific product providers (Partners Life, Chubb Life, AIA, Fidelity Life and Nib)
- our Financial Advice Provider (FAP) – Maverick Financial Services (NZ) Limited
- compliance, audit and IT service providers, as required to meet our regulatory and licensing obligations

Legal Basis

Some information is required to be collected under New Zealand law, including obligations under the Financial Markets Conduct Act 2013.

Your Rights

You have the right to request access to, and correction of, your personal information at any time in accordance with provisions of The Privacy Act 2020. If you would like to exercise these rights, please contact us by email at info@maverickadviser.nz

Specific Notification

On occasions when we obtain private or confidential information from a third party, we will:

- Name the source of the information
- Describes types of data or information received
- Clearly advise what our specific purpose is
- Identify other potential recipients
- Obtain your acknowledgement and consent