



**PRIVACY NOTICE**

**CLIENT  
PERSONAL  
INFORMATION**

## **PRIVACY NOTICE - CLIENT PERSONAL INFORMATION**

This privacy notice describes how BDO in New Zealand, which includes BDO New Zealand Ltd., and all BDO Independent Member Firms across New Zealand ('BDO', 'we', or 'us') collects and processes personal information about you; how we use and protect this information; and the choices you can make about how we use this information.

This privacy notice applies to all personal information we collect about you as a client of BDO. Personal information is information, or a combination of pieces of information that could reasonably allow you to be identified.

### **1 INFORMATION WE COLLECT**

We may collect your personal information from a variety of sources, including information we collect from you directly (e.g., when you contact us and provide services to us), and information we collect about you from other sources, including commercially available sources, such as, public databases (where permitted by law).

Certain personal information is required because of any contractual relationship we have with you or your employer, to enable us to carry out our contractual obligations to you or your employer. Failure to provide this information may prevent or delay the fulfilment of these obligations.

#### **1.1 Information we collect directly from you**

The categories of information that we may collect directly from you include the following:

- (a) personal details (e.g., name, age, date of birth);
- (b) contact details (e.g., phone number, email address, postal address or mobile number);
- (c) employment details (e.g., job title; employer name);
- (d) and other information depending on the service we provide to you

#### **1.2 Information we collect from other sources**

The following are examples of the categories of information we may collect from other sources. These sources include your employer, the service organizations used by you, public databases etc.

- (a) personal details (e.g., name, age, date of birth);
- (b) contact details (e.g., phone number, email address, postal address or mobile number);
- (c) other information (e.g., information about directorship and shareholding)

### **2 HOW WE USE YOUR PERSONAL INFORMATION AND THE BASIS ON WHICH WE USE IT**

We use your personal information to:

- (a) carry out background checks prior to accepting you as a client;
- (b) contact you with questions and other information regarding the services we are providing to you;

- (c) ensure that our records are kept accurate and up to date where you, your employees or contractors work on or visit our facilities;
- (d) ensure we issue accurate invoices for our services;
- (e) send you messages about products and services which we think will be of interest to you;
- (f) comply with legal obligations to which we are subject;
- (g) advancing our relationship with you;
- (h) keeping you up to date in relation to our services and industry developments;
- (i) other purposes related to our business

We must have a legal basis to process your personal information. In most cases the legal basis will be one of the following:

- (a) to fulfil our contractual obligations to you, for example to ensure that invoices are issued correctly, and for ensuring you are able to access our premises when required;
- (b) to comply with our legal obligations to you, for example health and safety obligations while you are on our premises, or to a third party (e.g., to comply with a court order);
- (c) to meet our legitimate interests so that: we are able to provide the services you request; our services function correctly in relation to your business; any complaints or concerns can be promptly relayed to you; we can respond to any questions or concerns you might have; we may carry out research and analysis to ensure products and services we offer are relevant to you, and; our records are kept up to date and accurate. When we process your personal information to meet our legitimate interests, we put in place robust safeguards to ensure that your privacy is protected and to ensure that our legitimate interests are not overridden by your interests or fundamental rights and freedoms. For more information about the balancing test that we carry out to process your personal information to meet our legitimate interests or if you want to object to these uses of your personal information, please contact us at the details below; and
- (d) to send you direct electronic marketing messages to the extent you have consented to receiving such messages in accordance with applicable law.

### **3 YOUR RIGHTS OVER YOUR PERSONAL INFORMATION**

Please let us know if any of the personal information that we hold about you changes so that we can correct and update the information on our systems.

You can view, correct, or update the personal information you provide to us by using the form given in Annexure 1 of our Privacy Policy.

In certain circumstances you may object to specific processing activities (including where we rely on our legitimate interests as set out above, require us to restrict how we process your personal information and ask us to share your personal information in a usable format with another company. Where you have given your consent to a particular type of processing, you may withdraw that consent at any time.

To exercise any of the above rights, please contact us using the details set out below.

#### **4 INFORMATION SHARING**

In general, we do not share your personal information with third parties (other than service providers acting on our behalf) unless we have a lawful basis for doing so.

We rely on third-party service providers to perform a variety of services on our behalf, such as website hosting, electronic message delivery, payment processing, data analytics and research. This may mean that we have to share your personal information with third parties. When we share your personal information in this way, we put in place appropriate measures to make sure that our service providers keep your personal information secure.

Other situations in which we may disclose your personal information to a third party, are:

- (a) perform other services we request from service providers;
- (b) in the course of a sale or an acquisition of BDO, any shares in BDO or any of BDO's assets;
- (c) where permitted by law, to protect and defend our rights and property; and
- (d) when required by law, and/or public authorities;
- (e) third parties authorized by you (e.g., your professional advisors, banks etc.)
- (f) to regulatory agencies, when we are under a legal obligation to provide the information. In such cases, it will be our endeavor to inform you regarding the disclosure.

We may also share aggregated information that cannot identify you for general business analysis, e.g., we may disclose the number of visitors to its websites or services.

#### **5 INFORMATION SECURITY**

We have implemented generally accepted standards of technology and operational security to protect personal information from loss, misuse, alteration, or destruction. We require all employees and principals to keep personal information confidential and only authorized personnel have access to this information.

We will keep your personal information for as long as we have a relationship with you. Once our relationship with you has come to an end, we will retain your personal information for a period that enables us to: maintain our business records for analysis and/or audit purposes; comply with record retention requirements under the law; defend or bring any legal claims; and deal with any complaints.

We will delete your personal information when it is no longer required for these purposes. If there is any information that we are unable, for technical reasons, to delete entirely from our systems, we will put in place appropriate measures to prevent any further processing or use of the data.

#### **6 INFORMATION TRANSFER**

Your personal information may be transferred to, stored, and processed in a country other than New Zealand (e.g., Australia). When we do so, we transfer the information in compliance with applicable data protection laws.

Where the transfer is to a country which provides a lower level of protection, we will take steps to ensure the security and confidentiality of your personal information in accordance with applicable data protection law, including using the guidance and Model Contract Clauses provided by the Office of Privacy Commissioner New Zealand, and for transfers to other BDO Member Firms, we use the BDO Global Privacy Policy, BDO's Binding Corporate Rules for Controllers and Processors. If you wish to see a copy of the relevant mechanism that we use to transfer your personal information, please contact us using the contact details set out below.

## **7 CONTACT US**

If you have questions or concerns regarding the way in which your personal information has been used, please contact the Privacy Champion using the form provided in Annexure 1 of our Privacy Policy.

We are committed to working with you to obtain a fair resolution of any complaint or concern about privacy. If, however, you believe that we have not been able to assist with your complaint or concern, you have the right to make a complaint to the [Office of Privacy Commissioner](#).

## **8 CHANGES TO THE PRIVACY NOTICE**

You may request a copy of this privacy notice from us using the contact details set out above. We may modify or update this privacy notice from time to time. You will be able to see when we last updated the privacy notice because we will include a revision date. Changes and additions to this privacy notice are effective from the date on which they are posted.

**AUGUST 2022**

**Version 1.0**

**Next Due for Revision: July 2023**