

Trustees Executors Online Wills

PRIVACY STATEMENT

Trustees Executors Limited (“TEL”, “we”) is committed to protecting your personal information in accordance with the Information Privacy Principles within the Privacy Act 2020. This privacy statement is made to enable individuals who use TEL’s Online Will System to understand how we collect and use your personal information.

What personal information do we collect?

Personal information that we collect from you may include personal information about yourself such as your name, date of birth, address, financial situation, gender, tax number, tax residency or any other information that is personal to you, as well as personal information about other people including any trustee or beneficiary of your Will.

How do we collect your personal information?

We collect personal information directly from you.

TEL may also collect personal information from public sources and/or screen your personal information against proprietary databases to meet customer due diligence requirements under anti-money and countering the financing of terrorism laws.

How do we use your personal information?

TEL collects, uses and stores your personal information in order to provide the Online Will System to you, and for the following purposes.

Personal information such as your name and email address that is provided in the course of creating an online Will, will be held by TEL for marketing and statistical purposes.

We may also use personal information provided by you, to provide background context to any named executor of your Will or to the Court **following your death** and to meet any legal obligations, including to verify your identity.

We may use stored information to communicate with you, including advising you of changes to existing services, to conduct surveys or to inform you of new products or services that we believe may be of interest to you.

We undertake measures to ensure your personal information is held securely and that it is only accessible by authorised staff.

TEL secures the personally identifiable information you provide on computer servers in a controlled, secure environment, protected from unauthorised access, use or disclosure.

In some situations your personal information may be held on cloud servers which may be located overseas, for example, as part of using Microsoft Office 365 or Amazon Web Services.

Providing personal information

You are under no obligation to provide us with your personal information; however, depending upon the nature of the information, this may prevent us from providing a product or service to you.

Browsing our website

There is information about your computer hardware and software that is automatically collected by TEL when you visit our websites. This information can include: your IP address, browser type, domain names, access times and referring website addresses. This information is used by TEL for the operation of the online service, to maintain quality of the service, and to provide general statistics regarding use of the TEL's website.

TEL's websites use "cookies" to help you personalise your online experience. A cookie is a text file that is placed on your hard disk by a web page server. Cookies are uniquely assigned to you and can only be read by a web server in the domain that issued the cookie to you. One of the primary purposes of cookies is to provide a convenience feature to save you time.

You have the ability to accept or decline cookies. Most web browsers automatically accept cookies, but you can usually modify your browser setting to decline cookies if you prefer. If you choose to decline cookies, you may not be able to fully experience the interactive features of the websites you visit.

Who stores your personal information?

TEL may hold details of personal information contained within your Will and may retain copies of your executed Will (if provided by you) to enable us to carry out our legal obligation of administering your estate and/or effectively carry out our fiduciary duties.

The process of creating an online Will involves use of a web-based programme provided by Automio Limited. Personal information provided by you such as your name and email address, will also be held by Automio and other businesses that support products and services provided by Automio, such as hosts of underlying systems, data centres or Cloud providers, which may be located outside New Zealand. You will be asked to agree to Automio's Privacy Policy <https://autom.io/privacy> when creating an online Will.

Furthermore, personal information associated with the payment of the cost of an online Will, will be held by Stripe Inc. and its third party business partners such as banks and payment method providers (for example, credit card networks), plus any hosts of Stripe's underlying business systems, data centres or Cloud providers which may be located outside New Zealand. You can access a copy of Stripe's Privacy Policy at <https://stripe.com/nz/privacy>.

We will not store your personal information for longer than the purpose for which we collected it, or longer than is reasonably required for legal purposes.

Who do we provide your information to?

If we are the executor of your estate, then we will be required to disclose the contents of your Will to the beneficiaries of your Will, **after your death**.

Under the Trusts Act 2019, there is a presumption (subject to certain factors) that every trustee of a trust must make basic trust information available to every beneficiary (or their representative) of a trust. This applies to any testamentary trust created by a Will. The information could include personal information such as the name of any beneficiary or trustee of a trust. This means the personal information of any of these parties and Trustees Executors is the trustee of the respective trust, your personal information may be disclosed to other beneficiaries associated with the trust.

Accessing and correcting personal information

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 would like to ask for a copy of your information, or to have it corrected, please contact us at enquiries@trustees.co.nz, phone 0800 878 783 or write to us at PO Box 10-519, Wellington 6143.

Changes to our privacy statement

TEL encourages you to periodically review this Privacy Statement as it may be updated from time to time as a result of changes to legislation, industry standards or customer feedback.