

Privacy Statement for Members and Beneficiaries of the mysuper Superannuation Scheme

Background

1. Shamrock Superannuation Limited (**Shamrock**) is the trustee and manager of the mysuper Superannuation Scheme (**Scheme**).
2. The Scheme is registered as an employer-related restricted workplace savings scheme under the Financial Markets Conduct Act 2013.
3. This document sets out the Scheme's Privacy Statement.

What does this privacy statement cover?

4. This Privacy Statement explains how personal information is collected, used and disclosed by or on behalf of Shamrock, including by the Administration Manager of the Scheme.
5. References in this Privacy Statement to 'we', 'our', or 'us' should be read as references to Shamrock and/or the Administration Manager, as the context requires.
6. This Privacy Statement explains how we collect, use, and disclose personal information about you, including how long we hold your personal information for. It also sets out how to request access to, and correction of, your personal information, and who to contact for further information.
7. This Privacy Statement is subject at all times to applicable law.

Privacy statement

How do we collect personal information?

8. We may collect personal information from you in the following circumstances:
 - (a) when you provide us with personal information through written and/or verbal communications;
 - (b) when you update us about any change to the details of your personal information;
 - (c) when we make requests for your personal information that we require; and
 - (d) when you contact us for any reason.
9. We may also obtain personal information about you:
 - (a) from a third party you have authorised to provide the information to us (including by way of example, and if applicable, your employer, or, where you are a nominated beneficiary of a Scheme member, that member); or
 - (b) as otherwise permitted by law.
10. If you provide us with personal information about a third party (such as your nominated beneficiary or any person you appoint to act on your behalf), you must ensure you are authorised to provide that information to us, and by providing that information to us, you confirm you have that authorisation.

What personal information do we collect?

11. We collect personal information that is necessary to manage the Scheme and our relationship with members of the Scheme (**Members**) and (as appropriate) their nominated beneficiaries (**Beneficiaries**).
12. The categories of personal information that we collect directly from you includes:
 - (a) your name, date of birth, gender, bank account details, and your contact details (for example, your address, phone number and email address);
 - (b) similar details, as appropriate, about your Beneficiaries (e.g. your spouse or relevant dependent children);
 - (c) medical information and/or financial information we require to determine if you have suffered permanent incapacity or ill health (as defined under the Scheme trust deed) while in service, or if you are entitled to a serious illness withdrawal or significant financial hardship withdrawal under the Scheme trust deed;
 - (d) information that we require to calculate and/or arrange for payment of benefits due to you (for example, your employment history and salary) and to calculate the employer contributions you are entitled to receive under the Scheme trust deed; and
 - (e) any other information that you may provide to us.
13. The categories of personal information we may collect indirectly includes:
 - (a) any of the information listed in paragraph 12; and
 - (b) any other information:
 - (i) you may authorise to be provided to, or collected by, us from third parties; or
 - (ii) which we require in order to administer the Scheme in accordance with the Scheme trust deed and/or applicable law.

For what purposes does Shamrock use your personal information?

14. We may use your personal information only for lawful purposes, including:
- (a) administering the Scheme;
 - (b) maintaining and updating Member records;
 - (c) complying with relevant laws and regulations which includes making sure that your benefits under the Scheme are calculated and paid correctly;
 - (d) identifying and communicating with Members and Beneficiaries (including responding to queries and requests);
 - (e) where use of the information is necessary in relation to a legal claim or a regulatory enquiry;
 - (f) any other purpose that we notify you of at the time your personal information is collected, or after which we have your explicit consent; and
 - (g) any other purpose permitted by law.

Who we may share your personal information with

15. We may share your personal information:
- (a) with the Administration Manager, our advisers and other service providers who we may engage from time to time, in order to facilitate the administration of the Scheme and the calculation and payment of your benefits;
 - (b) with Inland Revenue and other Government agencies where required by law;
 - (c) with other third parties (which may include your current or former employer), to the extent reasonably required to carry out any of the lawful purposes for which we may use your personal information (as outlined above);
 - (d) with your Beneficiaries if necessary for the administration of their benefit(s);
 - (e) if we are requested to do so in the course of legal proceedings or other investigations; or
 - (f) if authorised by you or where we are otherwise required or permitted to do so by applicable law.

Except as provided above, we will not share your personal information with any other third parties and will not sell, license, or rent your personal information to third parties.

The consequences if you do not provide us with your personal information

16. If you do not provide us, or authorise us to collect, the personal information we have requested or may require, we may be unable to provide certain Scheme services to you. For example, we may be unable to calculate and/or arrange for the payment of benefits due to you under the Scheme, or respond to your queries and requests.

How long do we hold your personal information for?

17. We may retain your personal information for as long as required to carry out any of the lawful purposes for which we may use your personal information (as outlined above) and/or as required by law.

The basis on which we provide links to third party websites

18. Scheme documents and/or communications that we have with you may contain links or references to third party websites. Unless expressly stated otherwise, those websites have not been developed by, and are not controlled by, us. They are provided for your convenience only, and their provision does not imply that we check, endorse, approve or agree with the privacy practices of those third party websites. We encourage you to read the privacy statements of each third party website you visit.

How can I request access to, and correction of, my personal information?

19. You have the right to request access to, and correction of, the personal information we hold about you. You can also update information (such as contact details) about you and your Beneficiaries, if any, through your member login on the Scheme website.
20. If you request access to, or a copy of, your personal information, we will provide you such access or copy unless there is good reason (in accordance with the Privacy Act 2020) for not doing so, which may include, for example, where the disclosure would breach someone else's rights to privacy, confidentiality obligations and/or the law.
21. If you request a correction to your personal information, you may also provide us with a statement of the correction sought (**Statement of Correction**). If we do not agree to your request for a correction, you may request that the Statement of Correction sought be attached to your personal information.
22. If you wish to request access to and/or correction of your personal information, please contact the Scheme's Privacy Officer at:

Privacy Officer

mysuper Superannuation Scheme
PO Box 1849
Wellington 6140

Email: hello@mysuper.co.nz

Who can I contact for more information?

23. If you have questions or concerns about this Privacy Statement or on personal information we hold about you, please contact the Scheme's Privacy Officer as indicated above.
24. If you believe that we have not resolved your concerns, you can complain to the Office of the Privacy Commissioner at privacy.org.nz

Changes to this Privacy Statement

25. This Privacy Statement may be updated at any time. If this Privacy Statement is updated, we will notify you at the address we have on file for you.