

Privacy Policy

last updated May 2026

INTRODUCTION

Accounted4 Ltd complies with the New Zealand Privacy Act 2020 (the Act), including amendments effective 1 May 2026, when dealing with personal information.

Personal information is information about an identifiable individual (a natural person).

As a chartered accountancy practice, we collect and manage personal information to provide professional services in areas such as tax compliance, financial reporting, payroll, and advisory.

This policy sets out how we collect, use, disclose, and protect your personal information.

This policy does not limit or exclude any of your rights under the Act. For more information, see www.privacy.org.nz.

CHANGES TO THIS POLICY

We may change this policy by uploading a revised version on our website. The change will apply from the date of publication.

WHO DO WE COLLECT YOUR PERSONAL INFORMATION FROM

We collect personal information about you from:

- you, when you provide information directly (e.g. onboarding forms, emails, physical records, accounting software access e.g. Xero, payroll data, phone calls, meetings)
- your business (e.g. directors, shareholders, employees)
- third parties, including:
 - Inland Revenue (IRD), ACC, Companies Office
 - banks and financial institutions
 - payroll providers or software platforms
 - referrers or professional advisors (lawyers, brokers, financial planners)
 - publicly available registers

If possible, we will collect personal information directly from you.

INDIRECT COLLECTION

Where we collect your personal information from a third party (for example IRD records, referrals, or payroll systems), we will take reasonable steps to ensure you are aware of:

- that we have collected your personal information
- what information we collected
- why we collected it
- who we may share it with
- who holds the information
- your rights to access and correct it

We will do this as soon as reasonably practicable unless you are already aware or an exception applies.

WHAT INFORMATION WE COLLECT

Depending on the services we provide, we may collect:

- identity details (name, date of birth, IRD number)
- contact details
- financial information (income, expenses, bank records)
- business records (financial statements, GST returns, payroll data)
- employment information (for payroll services)
- tax information and filings
- information about company structures, trusts, or investments

HOW WE USE YOUR PERSONAL INFORMATION

We use your personal information to:

- prepare financial statements, tax returns, and compliance filings
- provide tax advice and business advisory services
- interact with IRD, ACC, and other agencies on your behalf
- manage payroll and employee obligations
- verify identity and meet anti-money laundering (AML/CFT) requirements
- provide software and cloud accounting services
- communicate with you regarding your financial and business matters
- invoice and collect payment

- improve our services and systems
- comply with legal and regulatory obligations
- for any other purpose authorised by you or the Act

DISCLOSING YOUR PERSONAL INFORMATION

We may disclose your personal information to:

- IRD, ACC, Companies Office, and other government agencies
- banks, lenders, or financial institutions (with your authority)
- external professional advisors (e.g. lawyers, financial planners, auditors, tax experts)
- software providers (e.g. Xero, payroll platforms, document management systems)
- IT service providers, outsourcing and cloud hosting providers
- regulators or authorities where required by law
- any other person authorised by you

Some of these providers may be located outside New Zealand.

Where your information is disclosed overseas, we will take reasonable steps to ensure it is subject to safeguards comparable to those in the New Zealand Privacy Act.

PROTECTING YOUR PERSONAL INFORMATION

We take reasonable steps to safeguard personal information, including:

- secure cloud accounting systems
- access controls and authentication
- staff confidentiality obligations
- secure document storage and transfer

RETENTION OF PERSONAL INFORMATION

We retain personal information only as long as necessary, including:

- to meet our professional obligations
- to comply with legal and tax record-keeping requirements (typically at least 7 years)
- to resolve disputes or enforce agreements

PRIVACY BREACHES

If a privacy breach occurs that is likely to cause serious harm, we will notify:

- the Office of the Privacy Commissioner, and
- affected individuals

as required by law.

ACCESSING AND CORRECTING YOUR PERSONAL INFORMATION

You have the right to request access to, or correction of your personal information held by us or by any of the third parties identified in this Privacy Policy.

To request a correction of your personal information held by us, please contact us using the details below or by contacting your usual Accounted4 client manager.

Upon receipt of your written request, and enough information to allow us to identify you, we will provide you with the personal information we hold about you. We will also correct, amend or delete any personal information that we agree is inaccurate.

To make a request contact admin@accounted4.co.nz

INTERNET USE AND DIGITAL SERVICES

While we take reasonable steps to secure online systems, information provided over the internet is at your own risk.

We use cookies, analytics tools, and accounting software platforms to improve our services and user experience.

Third-party platforms (e.g. Xero, ShareFile) have their own privacy policies.

CONTACT US

If you have any questions or concerns about this Privacy Policy or our privacy practices, please contact us at:

Email: admin@accounted4.co.nz

Phone: 07 827 5192

Physical Address: 30 Duke St, Cambridge 3434

Post: PO Box 510, Cambridge, 3450

If you have any concerns or complaints about how we have handled your personal information, you can raise them via our internal complaints process, details of which are available on our website https://www.accounted4.co.nz/complaints_process/

If you are not satisfied with our response, you have the right to file a complaint with the Office of the Privacy Commissioner. You can find information on how to make a complaint at www.privacy.org.nz