

Privacy Policy – Morrison Partners

Last updated 30 July 2026

INTRODUCTION

This Privacy Policy sets out the practices of Morrison Partners Limited (Company number 8909928) (**Company**, referred to in this Privacy Policy as "we", "our" or "us") relating to the collection, use, disclosure, storage and retention of personal information. This policy also informs you of your rights in relation to your personal information.

The Company is a specialist corporate and commercial law firm, based in Auckland, New Zealand. Your privacy is important to us, and we are committed to ensuring that your personal information is protected. We are committed to protecting personal information in accordance with the Privacy Act 2020 (**Privacy Act**) and the Information Privacy Principles. If you have any questions about this policy, please contact our Privacy Officer at enquiries@morrisonpartners.co.nz.

This policy applies to personal information we collect directly from you, and also to personal information we collect about you indirectly, that is, from someone or something other than you.

PERSONAL INFORMATION:

Personal information is information about you that identifies you, or by which your identity can reasonably be ascertained. This includes your name, address, contact details such as email address and phone number, billing information, date of birth, identity information, information about your role or relationship to a client or matter, and written and verbal communications with us.

We may also collect personal information about individuals connected with a matter, transaction or client relationship, including directors, shareholders, beneficial owners, trustees, beneficiaries, employees, officers, guarantors, authorised signatories, agents, representatives, counterparties and other parties connected with a matter.

HOW DO WE COLLECT AND HOLD YOUR PERSONAL INFORMATION?

We collect personal information directly from you wherever we can, including when you interact with us, provide information through our website, contact us, apply for a role with us, or instruct us to represent and advise you. If you do not provide us with certain personal information that we request, we may not be able to provide our services to you.

The information we may collect and hold may include any of the following:

- Information to enable us to verify your identity, such as your name, date of birth and identity documents.
- Information obtained from publicly available sources, government agencies, regulators, public registers, identity verification providers, screening and monitoring providers, credit reporters, banks and financial institutions, and other third parties where required or appropriate for customer due diligence, anti-money laundering compliance, source of funds or source of wealth verification, conflict checking, identity verification, or the provision of legal services.
- Your contact information, such as your phone number, email address, physical address, billing address and billing information.

- Your job title, employer, role, authority, relationship to an organisation or client, and other information relevant to a matter.
- Your business interests and areas of interest and expertise, if you provide these to us or they are publicly available.
- Any interactions you have with us, including the time and date of contact, relevant emails, correspondence, documents and records of discussions.
- Other personal information we require from, or about, you to provide the advice that has been requested. This may be in the context of advice you have asked for, or that another person has asked for, such as your employer, an entity of which you are a director, shareholder or beneficial owner, a trust of which you are a trustee or beneficiary, or another client or party connected with a matter.
- If you apply for a job with us, information about your qualifications, experience, employment history, referees and other information relevant to your application.

We may store personal information we collect in any format we choose at our offices or at premises outside of our offices, including data storage facilities or online storage located within or outside New Zealand, which may be operated by independent service contractors or other service providers.

WHERE WE COLLECT YOUR PERSONAL INFORMATION FROM:

We collect personal information directly from you wherever we can. We also collect personal information about you from other people and sources. This is called indirect collection. We may collect personal information indirectly from:

- our clients, and people acting for our clients, where you are connected with a matter we are advising on, for example as a director, shareholder, beneficial owner, trustee, partner, guarantor, employee, officer, agent, authorised signatory, representative, counterparty or other party to a transaction or dispute;
- other parties to a matter and their advisers;
- accountants, financial advisers, referrers and other professional advisers;
- banks, financial institutions and insurers;
- government agencies, regulators, courts, tribunals and public bodies;
- publicly available sources, such as the Companies Register, Personal Property Securities Register, land records, court records, websites and other public registers;
- credit reporters, identity-verification providers, screening providers and anti-money-laundering service providers where we carry out customer due diligence, source of funds or source of wealth enquiries, identity verification, screening or ongoing monitoring;
- experts, consultants, barristers and other advisers involved in a matter; and
- referees, referrers and other third parties who provide information relevant to the services we provide.

Where you are connected with a matter but are not our client, we may not deal with you directly. In that case we will take reasonable steps to bring this policy to your attention, or we may rely on our

client or another person to make you aware of it, unless an exception in the Privacy Act applies.

WHEN WE COLLECT YOUR INFORMATION FROM SOMEONE OTHER THAN YOU:

Where we collect your personal information indirectly, we will take reasonable steps to make sure you are aware of the following, as soon as reasonably practicable after we collect it, unless an exception in the Privacy Act applies:

- that we have collected your personal information, and what we have collected;
- the purpose for which we collected it, as set out in this policy;
- the intended recipients of the information, as set out in this policy;
- our name and contact details, as the agency that collects and holds the information: Morrison Partners Limited, PO Box 191, Shortland Street, Auckland 1140, New Zealand, enquiries@morrisonpartners.co.nz;
- where the collection is authorised or required by law, the law concerned, for example the Lawyers and Conveyancers Act 2006, the Anti-Money Laundering and Countering Financing of Terrorism Act 2009, the Tax Administration Act 1994, FATCA, CRS, or a court order; and
- your right to ask for access to, and correction of, the information, and how to do so.

We may not need to take these steps in every case. For example, we may not need to notify you where you are already aware of these matters, where the information is publicly available, where notification would prejudice the purpose of the collection, where notification would prejudice litigation, an investigation or the conduct of court or tribunal proceedings, where notification is not reasonably practicable in the circumstances, or where another exception in the Privacy Act applies. Where we rely on an exception, we will keep a record of our reasons.

The IPP3A notification practices described in this policy apply to personal information we collect indirectly on or after 1 May 2026.

HOW WILL WE USE AND DISCLOSE YOUR PERSONAL INFORMATION?

We use your personal information to enable us to effectively provide legal services, administer our relationship with clients and other parties, meet our legal and professional obligations, and keep you updated with changes to the law or matters relevant to our services. For example, we may use your personal information to:

- Contact you in relation to any enquiries you make or to provide legal services to you or your employer.
- Provide legal services to our clients in relation to matters in which you are involved.
- Confirm or update your contact information.
- Engage or provide information to third parties on your behalf or in connection with a matter.
- Check for and manage commercial, legal or professional conflicts of interest.
- Undertake identity verification, customer due diligence, enhanced customer due diligence, source of funds or source of wealth enquiries, screening, ongoing monitoring and other checks required or permitted by law.
- Comply with our legal and professional obligations under the Lawyers and Conveyancers Act 2006, the Anti-Money Laundering and Countering Financing of Terrorism Act 2009, tax and

reporting obligations, and any court orders.

- Send you Company publications, with your consent, and invite you to seminars and functions.
- For employment purposes, such as considering you for a role at our Company.
- For internal business administration, billing, credit control, debt recovery, insurance, risk management, audits and other operational purposes.
- Use approved technology tools, including artificial intelligence and automated technology tools, to assist in providing legal services, conducting research, reviewing documents and improving efficiency, subject to appropriate human oversight and our obligations of confidentiality, privacy and professional conduct.

To carry out the activities or to achieve the purposes specified above, we may disclose your personal information to:

- People and organisations to whom you have authorised us to disclose your personal information.
- Our clients and people acting for our clients, where you are connected with a matter we are advising on.
- Parties involved in a matter for which you, your employer, or another client has engaged our services.
- Barristers, expert witnesses, consultants, accountants, financial advisers, overseas legal advisers and other professional advisers.
- Identity verification providers, anti-money-laundering service providers, credit reporters, screening and monitoring providers, banks, financial institutions and insurers.
- Service providers that enable us to store, manage, process, audit and analyse the information we hold, including cloud, document management, practice management, communication, IT support, data storage and other technology providers.
- Third party service providers that we engage to help us provide services to you or operate our business.
- Courts, tribunals, government agencies, regulators, law enforcement agencies, the New Zealand Law Society and other bodies where required or permitted by law.
- Other parties where disclosure is necessary or appropriate to provide legal services, protect our interests, enforce rights or obligations, or comply with legal, regulatory or professional obligations.

The Company will take reasonable steps to ensure third parties receiving personal information are under obligations the same as or similar to this privacy policy, where appropriate. The Company accepts no responsibility or liability for how third parties use personal information where they act independently of us or where disclosure is made through your use of a third-party platform, site or service.

ARTIFICIAL INTELLIGENCE AND TECHNOLOGY TOOLS:

We may use approved artificial intelligence and automated technology tools to assist in providing legal services, conducting research, reviewing documents and improving efficiency. Any use of such tools is subject to appropriate human oversight and our obligations of confidentiality, privacy and

professional conduct. Some service providers of those tools may store or process data within or outside New Zealand.

ACCESS AND CORRECTION:

Under the Privacy Act 2020, you have the right to request access to any personal information we hold about you, whether we collected it from you or from someone else, and to ask for it to be corrected if you think that it is wrong. If you would like to make a request, or ask us anything else in relation to your privacy, please ask the person you are dealing with, send us an email to our Privacy Officer at enquiries@morrisonpartners.co.nz or send a letter to:

The Privacy Officer
Morrison Partners Limited
PO Box 191, Shortland Street
Auckland 1140
New Zealand.

You can also find more information on the Privacy Commissioner's website at <https://www.privacy.org.nz>.

PRIVACY QUESTIONS AND COMPLAINTS:

If you have a question, complaint or concern regarding our handling of personal information, please contact our Privacy Officer at enquiries@morrisonpartners.co.nz. We will consider and respond to privacy questions and complaints in accordance with our obligations under the Privacy Act 2020.

UPDATES TO THIS POLICY:

We reserve the right to update this Privacy Policy from time to time. Any change we make applies from the date the updated Privacy Policy is posted on our website.