

## Indirect Collection Source Schedule

Indirect collection of personal information:

Sometimes we collect personal information about individuals from someone other than the individual concerned. This is indirect collection.

When we collect personal information indirectly, we take steps that are reasonable in the circumstances to make sure the individual is aware of:

the fact that the information has been collected

- the purpose of collection
- the intended recipients
- our identity and contact details
- the law authorising or requiring collection, where applicable
- their rights to access and correct their information.

Our Indirect Collection Source Schedule sets out the common third parties we collect from, the information involved, the purpose of collection, and who the information may be shared with.

You can access the current schedule below or request a copy from [compliance@msfs.co.nz](mailto:compliance@msfs.co.nz).

We also use service providers to store or process personal information on our behalf.

Those provider arrangements are managed separately from our indirect collection practices.

## Indirect Collection Source Table

Third party	Information exchanged	Purpose	Law basis	Notice method
AIA New Zealand Limited	→ Application, client health and financial information ← Underwriting decision, exclusions, risk loadings, premium terms	Arrange or assess insurance options	Usually not applicable	Personal Information Authority + schedule
nib nz limited	→ Application, client health and financial information ← Underwriting decision, exclusions, risk loadings, premium terms	Arrange or assess insurance options	Usually not applicable	Personal Information Authority + schedule
Partners Life Limited	→ Application, client health and financial information ← Underwriting decision, exclusions, risk loadings, premium terms	Arrange or assess insurance options	Usually not applicable	Personal Information Authority + schedule
Southern Cross Medical Care Society	→ Application, client health and financial information ← Underwriting	Arrange or assess insurance options	Usually not applicable	Personal Information Authority + schedule

	decision, exclusions, risk loadings, premium terms			
Chubb Life Insurance New Zealand Limited	→ Application, client health and financial information ← Underwriting decision, exclusions, risk loadings, premium terms	Arrange or assess insurance options	Usually not applicable	Personal Information Authority + schedule
Fidelity Life Assurance Company Limited	→ Application, client health and financial information ← Underwriting decision, exclusions, risk loadings, premium terms	Arrange or assess insurance options	Usually not applicable	Personal Information Authority + schedule
Union Medical Benefits Society Limited (UniMed)	→ Application, client health and financial information ← Underwriting decision, exclusions, risk loadings, premium terms	Arrange or assess insurance options	Usually not applicable	Personal Information Authority + schedule
Lifelong Wealth Limited	→ Client name, contact details, and limited context for the introduction←	Make first contact and understand the	Not applicable	Referral first-contact notice unless prior notice can be evidenced

	Client name, contact details, and limited context for the introduction	reason for referral		
Strategi Limited	→ Advice, reports, or compliance outputs delivered to the business ← Employee or related person information (e.g. employment records, legal instructions) provided to enable the work	Provide compliance services	Depends on context	Standalone notice or evidence of prior notice

### Version control and review

Keep old versions. If a collection is later questioned, you may need to show what version of the schedule the person was directed to at the time.

Field	Entry
Owner	Anderson Feng
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