



COMMITTED TO PROVIDING
EXCEPTIONAL CUSTOMER SERVICE

POPI Privacy Policy Statement

Respecting and protecting your Personal Information is very important to us. It is also a Constitutional right, legal, and good business practice requirement, which we regard highly.

In line with the requirements of the Protection of Personal Information Act, 4 of 2013 (the Act), we:

- Accept joint responsibility and accountability to responsibly manage and protect your Personal Information when providing you with advice and intermediary services.
- Undertake to collect and access your Personal Information directly from you or from a third party with your prior and written approval while respecting your right to withdraw your consent for the processing of your Personal Information.
- Undertake to only collect and process Personal Information that is necessary for us to obtain a holistic view of your personal and financial circumstances, allowing us to conduct a suitable financial needs analysis, provide you with proper financial advice, make recommendations and provide assistance in the conclusion of the necessary business transactions.
- Undertake not to share your Personal Information with any third party, unless when required for the purpose of assisting you with the conclusion of a transaction or when required by the law.
- Undertake to be open and transparent regarding the Personal Information being collected, the reason for and manner of collection of such information.
- Undertake to safeguard and protect your Personal Information in our possession.
- Undertake to update and correct your Personal Information kept on file; and
- Undertake not to retain Personal Information longer than is required by the relevant legislation governing the financial sector.

We (and indirectly the financial product providers that we are contracted with) need to gather, process, and store your Personal Information for reasons:

- To conduct a suitable financial needs analysis and identify your needs and goals.
- To share with our contracted financial product providers and assist you in the conclusion of required business transactions you requested.
- To maintain our relationship with you.
- To respond to your queries and provide assistance when required to do so.
- To confirm and verify your identity or to verify that you are an authorised user for security purposes.
- For policy underwriting purposes.
- To assess and process claims.
- For audit and record-keeping purposes; and
- In connection with possible requirements by the Information Regulator or other Government agencies allowed by law, legal proceedings, or court rulings.

We may need to share your Personal Information and/or utilise software or online platforms to enter and process your information for an application, claims, or business management purposes. This will only be done in strict adherence to the requirements of the Act.

Any additional information or concerns can be found and raised with the Information Regulator, who can be contacted as shared below, but please feel free to contact Samantha Jonker first to discuss any questions or concerns you may have:

Website: <https://www.justice.gov.za/inforeq/>

Tel: 012 406 4818

Email: inforeq@justice.gov.za

Client Name

Client Signature

Date

Registration No: 2016/149882/07

FSP No: 47852

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