

Lifestyle and Wealth Management

Protection of Personal Information Policy

The Protection of Personal Information (POPI) Act requires us to inform clients how we use and disclose their personal information.

We are committed to protecting our clients' privacy and will ensure that the clients' personal information is used appropriately, transparently and according to applicable law.

Information we collect

We collect and process clients' personal information mainly to provide our clients with the services and products of the providers with whom we have contractual agreements in place.

The type of information we collect may depend on the need for which it is collected and will be processed for that specific purpose only. We may also supplement the information provided to us with information from other providers in order for Wealth Management to offer a more consistent and personalised service and to meet regulatory requirements.

Our contracted providers may also require additional personal information of yours and they will be subject to the same privacy regulations as we are.

Use of information

We will use clients' personal information only for the purposes for which it was collected and agreed to. This may include:

- Confirming and verifying identity;
- Providing products or services and to carry out transactions required;
- For the detection and prevention of fraud, crime, money laundering or other malpractice;
- For audit and record keeping purposes;
- Providing clients with communications in respect of Wealth Management and regulatory matters that may affect our clients;
- In connection with and to comply with legal and regulatory requirements or when it is otherwise allowed by law;
- In connection with legal proceedings;
- Conducting market or customer satisfaction research;
- For underwriting purposes;
- Assessing and processing claims.

Disclosure of your information

We may disclose clients' personal information to our providers whose services and/or products we are contracted to invest in. We have agreements in place to ensure that they comply with standard privacy terms and conditions. We may also share your personal information with, and obtain personal information from third parties, for the purposes listed above.

We may also disclose your information where we have a duty or a right to disclose in terms of applicable legislation, the law or where it may be necessary to protect our rights.

Safeguarding your information

The POPI Act requires us to adequately protect the personal information we hold and to avoid unauthorised access and use of your personal information. We will continuously review our security controls and processes to ensure that your personal information is secure. Should we need to share your personal information with another country for processing or storage, we will ensure that any party to whom we pass on your personal information will treat your information with the same level of protection as required from us.

Your rights to access and correction of your personal information

You have the right to access personal information we have on record, for you. You may ask us to update, correct or delete your personal information. We will take all reasonable steps to confirm your identity before providing details of, or making changes to your personal information.

Our contact details are:

Telephone number: 011 702 8100

Physical address: Regent Hill Office Park, Cnr. Leslie and Turley Roads, Lonehill

Email address: lifestyle@wealthmanagement.co.za

Changes to this policy

Please note that we may amend this policy from time to time. You may request a copy of the latest version from us.

