

## Privacy Policy

Your privacy is very important to us. Accordingly, we have developed this Policy in order for you to understand how we collect, communicate, disclose and make use of your Personal Information. The following outlines our privacy policy.

- Before or at the time of collecting Personal Information, we will identify the purposes for which this information is being collected.
- We will collect and use the Personal Information solely with the objective of fulfilling those purposes specified by us and for other compatible purposes, unless we obtain the consent of the individual concerned or as required by law.
- We will only retain personal information as long as necessary for the fulfilment of those purposes.
- We will collect Personal Information by lawful and fair means and, where appropriate, with the knowledge or consent of the individual concerned.
- Personal Data should be relevant to the purposes for which it is to be used, and, to the extent necessary for those purposes, should be accurate, complete, and up-to-date.
- We will protect Personal Information by reasonable security safeguards against loss or theft, as well as unauthorized access, disclosure, copying, use or modification.
- We will make readily available to customers information about our policies and practices relating to the management of Personal Information.
- Should the law require us to disclose such information, or where you have already contractually allowed us to make use of such information, we will be free to disclose such information where we see fit.



## **Purpose for Processing your Information**

We collect, hold, use and disclose your personal information mainly to provide you with access to the services and products that we provide. We will only process your information for a purpose you would reasonably expect, including:

- Providing you with advice, products and services that suit your needs as requested.
- To verify your identity and to conduct credit reference searches.
- To issue, administer and manage your customer records.
- To notify you of new products or developments that may be of interest to you.
- To confirm, verify and update your details.
- To comply with any legal and regulatory requirements.

Some of your information that we hold may include, your first and last name, email address, a home, postal or other physical address, other contact information, your title, birth date, gender, occupation, income, expenditure, criminal history and your banking details.

Please note that we are required in terms of the General Code of Conduct for SARS to retain records for 5 years after the termination of the transaction.

We are committed to conducting our business in accordance with these principles in order to ensure that the confidentiality of Personal Information is protected and maintained.

## PERSONAL INFORMATION REQUEST FORM

**Please submit the completed form to the Information Officer:**

Name	
Contact Number	
Email Address:	

Please be aware that we may require you to provide proof of identification prior to processing your request.  
There may also be a reasonable charge for providing copies of the information requested.

### A. Particulars of Data Subject

Name & Surname	
Identity Number:	
Postal Address:	
Contact Number:	
Email Address:	

### B. Request

I request the organisation to:

- (a) Inform me whether it holds any of my personal information
- (b) Provide me with a record or description of my personal information
- (c) Correct or update my personal information
- (d) Destroy or delete a record of my personal information

<input type="checkbox"/>
<input type="checkbox"/>
<input type="checkbox"/>
<input type="checkbox"/>

### D. Signature Page

Signature

Date