KOTIE FOURIE BROKERS 1998/072879/23 T/A

Fourie Financial Services & Professional Accountants (SA)

Fourie Financial Services
ACCOUNTANTS • BROKERS

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Kotie Fourie: *Principal*
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Reg Prof. Accountant SAIPA27641
Stephan Fourie:
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31 MAY 2021

Dear Client

<u>NOTICE IN TERMS OF SECTION 18 PROTECTION OF PERSONAL INFORMATION ACT, 2013</u>

Why we ask for personal information from our clients and how we use it.

The purpose of this notice is to let you know:

- How we, Fourie Financial Services & Professional Accounts (SA), will use and disclose the personal information of our clients and that of any other people insured under their policies.
- What your rights and responsibilities are when providing your personal information to us.
- What our responsibilities are to comply with the Protection of Personal Information Act 4 of 2013 (the POPI ACT) to keep your information safe.

Consent to use the personal information of our clients.

To comply with the POPI Act, Fourie Financial Services & Professional Accountants (SA), has strict policies, rules and measures in place to protect the confidentiality of the personal information of our clients. The POPI Act requires us to inform you of the purpose(s) for which we will process your personal information. These include:

- Sharing your personal information with contracted service providers, who are legally bound to protect your information and must agree to our confidentiality policies and rules.

The right and responsibilities of our clients.

- When our clients give us their personal information and personal information for any other people insured under their policies, they do so voluntarily so that we can do business with them.
- They give us their consent to collect, record, store, update and use or process all personal information provided to us, which includes health and financial information.
- They have the right to know what personal information we have about them and to access it at any time.
- They have the right to ask us to update or correct the information we have for them at any time.
- They warrant that they are authorised to provide us with the personal information.
- They have the right to object to us using the personal information, except when we need it to do business with them, or to comply with legal requirements.

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- If our clients think their personal information has been tampered with, or that it has not been protected, they can discuss their concern with us by sending an email kotie@deaarsa.co.za . If they are not satisfied with the outcome after discussing it with us, they may refer their complaint to the Information Regulator by sending an email to inforeg@justice.gov.za or by calling 012 406 4818.

Our responsibilities and why we need the personal information of our clients.

- Having the personal information of our clients and that of any other people insured under their policies or administered on a retirement fund enables us to do business with them.

- We need their personal information and that of any other people insured under their policies to:
  - Fulfil our obligations regarding their products or benefits;
  - Administer their products or benefits and related service and to process any claims
  - submitted, and
  - Provide services, advice and/or intermediary services linked to their products or benefits;

- We may use their personal information for historical, statistical and research purposes.

- We will determine how or why their personal information is processed at all times.

- We will not share their personal information with any third parties, unless:
  - They have given consent for us to share it; or
  - Sharing it is necessary to put an agreement in place that is for their benefit; or
  - We are allowed to share the information as prescribed in the POPI Act.

- We will only use their personal information for the purpose which it has been provided to us and not for any other reasons, unless:
  - They have given consent for us to use it for another reason; or
  - It is necessary to put an agreement in place that is for their benefit; or
  - We are allowed to use the information as prescribed in the POPI Act.

- We will make sure we put reasonable measures in place to protect their personal information.

Responsibilities of our partners and contracted service providers.

To administer their products properly, we need to share the personal information of our clients with contracted service providers, such as underwriters, in South Africa.

Fourie Financial Services & Professional Accountants (SA) will make sure that the contracted service providers agree to our privacy and security policies and rules if they need to access their personal information for the following purposes:

- To implement their products or benefits.

- For underwriting and reinsurance purposes.

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- To make it possible for them to view products and benefits and transact on their fund administrator's website.
- To do a risk profile analysis of their existing products or benefits, or to do underwriting.
- To carry out statistical analysis.
- To analyse consumer needs and develop new products and services.
- To conduct research among our clients or members to gain important insights into and an ongoing understanding of their experiences and changing needs, so that we can keep improving our products and service offerings.

Should you have any questions or concerns you are welcome to contact our office during office hours.

Yours faithfully

JD FOURIE
PRINCIPAL