



PROTECTION OF PERSONAL INFORMATION ACT

Privacy Policy Statement

Last updated: 1 July 2021
Personal Trust is a registered Financial Services Provider under Licence number 707
Personal Trust (Pty) Limited Reg No. 1951/002859/07


PRIVACY POLICY STATEMENT

This policy forms part of the Personal Trust group entities internal business processes and procedures.

The business's management, its employees, contractors, suppliers, and any other persons acting on behalf of the business are required to familiarize themselves with the policy's requirements and undertake to comply with the stated processes and procedures.

POLICY ADOPTION

Personal Trust (Pty) Ltd group has appointed an Information Officer in terms of s56 of Protection of Personal Information Act ("POPI"), read with s17 of the Promotion of Access to Information Act ("PAIA"). The Information Officer should be the first point of contact for any queries regarding this framework or any of the policies contained herein. The Information Officer's details are as follows:

Information Officer	Thando Gobe
Contact Details	Email: tgobe@ptrust.co.za Contact Number: (021) 689 89 75
Signature	
Date	1 July 2021

INTRODUCTION

This policy explains how Personal Trust (Pty) Limited and its subsidiaries ('we', 'us' or 'our') obtain, use and disseminate your personal information. We are committed to protecting your privacy and ensuring that your personal information is collected and used properly and lawfully.

It is to provide our clients with a standard good practice Privacy Policy Statement to be shared with clients and business stakeholders.

PURPOSE

This policy explains how we deal with your personal information and explains your rights, as more fully set out in the POPI Act ('the Act'). This policy is subject to the Act and also any applicable codes of conduct that may be issued by a regulator from time to time.

However, the following principles are important to us:

- We value the trust that you place in us by giving us your personal information.

- We will always use your personal information in a way that is fair and worthy of that trust.
- You are entitled to clarity on how we use your personal information.
- We will always be transparent about the information we collect, what we do with it, and with whom we share it.
- We will work with you to resolve any concern about how we use your information.
- We will take all reasonable steps to protect your information.
- We will comply with all applicable data protection laws. In the absence of data protection laws,
- we will apply generally accepted principles governing data protection.

COLLECTION OF PERSONAL INFORMATION

- We collect and process personal information mainly to provide you with our products and services.
- The type of information we collect will depend on the purpose for which it is collected and used.
- We will only collect information that we need in order to provide you with the products and services you have selected.
- We will collect information directly from you, for example when you invest with us, or make use of our services.
- We also collect information about you from other sources as explained below

YOUR PERSONAL INFORMATION

We will use your personal information only for the purposes for which it was collected or as agreed,

for example:

- to provide our products or services to you
- to execute the transactions you requested
- to maintain our relationship with you and communicate with you
- to conduct credit reference searches or verification
- to confirm and verify your identity
- to detect and prevent fraud, crime, money laundering or other malpractice
- for audit and record keeping purposes
- to liaise with third-party service providers to offer services that you may require
- for legal proceedings

We will also use your personal information to comply with legal and regulatory requirements or industry codes and standards.

You have the right to at any time ask us to update, correct or delete your personal information and your authority and consent provided in this form.

INFORMATION DISCLOSURE

We share your personal information with our service providers as needed to deliver products or services to you. This exchange of information is governed by a contractual relationship with our service

providers setting our expected standards of protecting personal information. We are required to disclose or report your personal information by law or any regulatory authority.

INFORMATION SECURITY

We undertake to provide protection for the personal information we hold and to prevent unauthorised access to your personal information. We will continue to review our security controls to ensure that your personal information is secure.

Our security policies and procedures include:

- physical security
- computer and network security
- secure communications
- security when contracting out activities or functions
- investigating and reacting to security incidents
- Should we transfer your personal information to another country, eg. when we use off-site cloud data storage facilities, we will ensure that the country offers the same level of legal protection as we do.

RETENTION OF YOUR PERSONAL INFORMATION

We will retain your personal information to allow you a reasonable opportunity to request access to it at any time during or after your relationship with us.

We will retain your information for a period of 5 years following the termination of our relationship as required by law. In addition to this, we may retain information for longer periods for historical, statistical and research purposes. We have established appropriate safeguards against your records being used for any other purposes. You may contact us to request that your personal information be de-identified. We will however retain the de-identified information for historical, statistical and research purposes as set out above.

DETAILS OF OUR REGULATOR:

The Information Regulator's office may be contacted for any queries regarding POPI in general, or to lodge formal documentation. Their contact details are as follows:

Information Regulator
33 Hoofd Street
Forum III, 3rd Floor Braampark, Braamfontein, Johannesburg
Mr Marks Thibela
Chief Executive Officer
Cell No. +27 (0) 82 746 4173
Email: Mthibela@justice.gov.za and inforeg@justice.gov.za