

PRIVACY STATEMENT

The Protection of Personal Information Act, 2013

I AM SURE Financial Services (Pty) Ltd Registration Number (2010/019850/07) **FSP 42982**

What is the POPI Act?

The abbreviation stands for Protection of Personal Information Act. The legislation was signed in 2013 and promotes the protection of the personal information by private and public bodies; introduces minimum standards to be exercised when personal information is processed, stored and protected; and generally, protects your constitutional right to privacy.

Who is I AM SURE Financial Services?

I AM SURE Financial Services, as an authorised financial services provider, is defined as a responsible party in terms of the Act. Our FSP licence allows us to provide advice and intermediary services for the following financial products: short-term insurance, long-term insurance, investments, and health services benefits.

Why are we telling you about this?

I AM SURE Financial Services is committed to protecting our clients' privacy and confidentiality and strive to conduct our business responsibly by taking the appropriate measures to securely protect, process, store and retain the personal information in our possession throughout the duration of us rendering financial services to you.

In order to render financial services to you, we require certain personal information from you so that we may assist with the following, on your behalf:

- ✓ Obtain insurance quotes;
- ✓ Administer changes, updates and annual review of your policy;
- ✓ Manage your claims; and
- ✓ Handle general insurance related queries.

What personal information do we have in our possession?

- ✓ Unique identify number (such as a policy number);
- ✓ Identity number / Passport number;
- ✓ Full name and surnames; full company and trading name;
- ✓ Physical and postal address;
- ✓ Email address;
- ✓ Telephone numbers;
- ✓ Gender;
- ✓ Race;
- ✓ Marital status;
- ✓ Nationality;
- ✓ Language preference;
- ✓ Financial and claims history;
- ✓ Bank account details;
- ✓ Physical and/or mental health well-being;
- ✓ Pregnancy;
- ✓ Disability;
- ✓ Medical history; and
- ✓ Related confidential correspondence.



I AM SURE FINANCIAL SERVICES (PTY) LTD
is an authorised financial services provider

FSP: 42982

REG NO: 2010/019850/07

Directors: J.W. van Greunen, D. van Deventer.

 **086 110 SURE (7873)**

 **www.iamsure.co.za**

 **Menlyn Corporate Park –
Block A, 175 Corobay Avenue,
Waterkloof Glen X11, Pretoria, 0181**

Who do we share your personal information with?

We will share some or all of above personal information with the following entities:

- ✓ Insurers / Underwriting Managers with whom we have signed agreements;
- ✓ Third party service providers, for example an assessor, repairer, etc.;
- ✓ Government (where we are required to do so in terms of any legislation).

We will only share the minimal amount of personal information with any entity, as is required for them to fulfil their obligations towards you.

How do we share your personal information?

We use various mediums to interact and process information, including but not limited to:

- ✓ Interactive forms and links on our website;
- ✓ Microsoft 365 / including Outlook 365;
- ✓ Various social media platforms for example WhatsApp;
- ✓ Various web-based services.

Where we share your personal information with third parties, we will ensure that they are contractually bound to apply the necessary security measures.

Some of these service providers may be situated outside of the borders of the Republic of South Africa (RSA). In accordance with POPI Act we will only use service providers that are subject to information protection legislation similar or better than that of the RSA.

How do we protect your personal information?

We take the necessary reasonable measures to ensure that personal information, in both physical and electronic form, are subject to an appropriate level of security when processed and communicated by us, in order to protect against access and acquisition by unauthorised persons and accidental loss, destruction or damage.

We cannot guarantee the security of information you transmit to us online and you do so at your own risk.

How long will this personal information be stored for?

We are legally obliged in terms of the Financial Advisory and Intermediary Services Act 37, of 2002 to retain all verbal and written communications related to the financial services rendered to you for a period of 5 years after termination of the financial product.

Can you object, correct and/or request that we destroy your personal information?

In the event that you wish to object, correct and/or request that we destroy the personal information, which is in our possession, please complete the Personal Information Objection, Correction or Destruction Request form (available on our website), and email it to our Information Officer.

Who is our Information Officer?

Name of Information Officer:	Jan Wilhelm van Greunen
Physical address of FSP:	Menlyn Corporate Park – Block A, 175 Corobay Avenue, Waterkloof Glen X11, Pretoria, 0181
Contact number:	082 331 2530 / 086 110 7873
Email address:	wimpievg@iamsure.co.za
Website:	www.iamsure.co.za

Where can you address complaints to?

We would appreciate the opportunity to address any complaints regarding our processing of your personal information, however, you have right to complain to the Information Regulator at:

Physical address:	Woodmead North Office Park, 54 Maxwell Drive, Woodmead, Johannesburg
Postal address:	PO Box 31533, Braamfontein, Johannesburg, 2017
Contact number:	010 023 5200
iSupport link:	https://eservices.inforegulator.org.za/isupport/default.aspx
General enquiries email:	enquiries@inforegulator.org.za