



## LIFESTYLE BROKERS No 1

### PRIVACY STATEMENT

#### Protection of Personal Information Act, 4 of 2013

#### **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 Lifestyle Brokers No. 1?**

Lifestyle Eksekuteurskamers (Pty) Ltd trading as Lifestyle Brokers No. 1 (FSP 41764), 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 personal and commercial insurance.

#### **Why are we telling you about this?**

FSP Name 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;

Your Lifestyle Team.

Ruimsig Country Office Park A4, 129 Hole In One Drive, Ruimsig, Roodepoort, 1724  
Authorised Financial Services Provider – FSP Number 41764

Tel. – (011) 662 – 1742 | Direct Fax 2 email – (086) 681 7704 | E-mail - info@lifestylegroup.co.za

- Disability;
- Medical history; and
- Related confidential correspondence.

### **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: | Heinrich von Brandis   |
| Physical address of FSP:     | Ruimsig Country Office Park Unit A4<br>129 Hole-in-One Road<br>Ruimsig<br>1724 |

Postal address of FSP: PO Box 2213  
Ruimsig  
1732  
Contact number: 011 662 1742  
Email address: info@lifestylegroup.co.za  
Website: www.lifestylegroup.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: JD House, 27 Stiemens Street, Braamfontein, Johannesburg, 2001  
Postal address: P.O. Box 31533, Braamfontein, Johannesburg, 2017  
Website: [www.justice.gov.za](http://www.justice.gov.za)  
Complaints email: [complaints.IR@justice.gov.za](mailto:complaints.IR@justice.gov.za)  
General enquiries email: [inforeq@justice.gov.za](mailto:inforeq@justice.gov.za)