

PRIVACY STATEMENT

1. WHO WE ARE

Integral Wealth Management (Pty) Ltd
Registration Number: 2015/395284/07 (FSP 46563)
Block B, The Offices of Hyde Park
1 Strouthos Road
2nd Avenue
Hyde Park
JOHANNESBURG

We are an independent financial advisory business, working with our clients to design and implement financial plans that are unique to your personal requirements.

2. WHAT WE NEED

- 2.1 Our Data Protection Policy governs the use and storage of your Personal Information. You can request a copy of our POPIA Compliance Framework Policy from our Information Officer, Lara Warburton.
- 2.2 Integral Wealth Management is a Responsible Party (as defined in the Protection of Personal Information Act No 4 of 2013) of the Personal Information that you (the Data Subject) provide to us about yourself.
- 2.3 We have a legal obligation under various pieces of legislation to identify our customers (Anti-Money-Laundering and Know-your-Customer)
- 2.3 The purposes, types of information, legal grounds and retention period of personal information we collect from you are:
- Your name, contact details, ID number, tax number and bank account details
 - Information on all investments, policies, medical and life assurances, wills and legal structures linked to you
 - Information regarding your family, employment, personal circumstances and anything relevant to partnering with you and designing a financial plan unique to you and your family
 - Our website collects cookies on all visitors
 - In all instances you will either personally disclose this information, or will agree to any independent data collection in writing

3. WHAT WE DO WITH IT

- 3.1 We use your Personal information in order to provide you with independent financial planning services.
- 3.2 We may disclose your Personal information to our third-party service providers, where necessary. However, should we make such a disclosure we require that our service providers take appropriate, reasonable, technical and organizational measures to keep your Personal information secure. In addition, our service providers may not use or disclose Personal information for any purpose other than providing the services on our behalf.
- 3.3 We may also use your Personal Information:
 - 3.3.1 when such disclosure is necessary to protect the legitimate interest (safety, property or other rights) of the Company, our directors, employees, consultants, or any other person, or where required or permitted by law; or
 - 3.3.2 if we are under a duty to disclose or share your Personal Information in order to comply with any legal obligation.
 - 3.3.3 There is a possibility that the Personal Information that we collect from your may have to be transferred to; and stored at, a destination outside of the Republic of South Africa (for example, by a third party data hosting service provider). If your Personal Information is transferred outside of South Africa, we will take reasonable organizational and/or contractual measures to ensure that your Personal Information is processed by such third party service providers for the purposes for which it has been provided to us and that the required levels of protection have been implemented by such third party service providers to safeguard your Personal Information.

4. HOW LONG WE KEEP IT

The data provided will be stored no longer than is strictly necessary. Current legislation requires us to store personal data for (5) five years following the termination of the relationship. After this period, your Personal Information will be irreversibly destroyed. Any Personal Information held by us for marketing and service update notifications will be kept by us until such time that you notify us that you no longer wish to receive this information.

5. WHAT ARE YOUR RIGHTS

Should you believe that any Personal Information we hold on you is incorrect or incomplete, you can request to see this information, rectify it or have it deleted. Please speak to your financial advisor to arrange a meeting to amend your information. Alternatively, contact our Information Officer who will look into your complaint and work with you to resolve the matter.

If you still feel that your Personal Information has not been handled appropriately according to the law, you can contact the Information Regulator at infoereg@justice.gov.za and file a complaint with them.



6. VALIDITY AND DOCUMENT MANAGEMENT

Our Company keeps this Privacy Policy under regular review, alternatively the updates can be requested from our Information Officer at any time. This document is valid as of 1 June 2021.