

Privacy statement



1 What is the purpose of this statement?

This privacy statement sets out how the fund uses and protects your personal information to comply with the requirements of the Protection of Personal Information Act 4 of 2013 or POPIA.

From when does it apply?

This privacy statement came into effect on 1 July 2021.

2 Why do you collect and use personal information?

The main purpose of the fund is to:

- provide benefits to members on leaving the fund, or at retirement
- make payments to beneficiaries should a member pass away, as detailed in the registered rules of the fund

The personal information that we collect and process for members is used mostly for this reason. The fund must also collect and process information to comply with the laws of South Africa.

How do you use my personal information?

Your information is used to provide you with fund benefits, keep your records updated, make payments, contact you and comply with the laws of South Africa.

What personal information do you collect?

Your personal information includes:

Contact details

Your name and surname

Information about your beneficiaries, including information of children

Demographic information (age, race)

Salary information

Financial information:

- bank account details
- tax information
- records of claims

In some cases, your health or medical information, including disability status



3 How do you source and disclose my personal information?

We receive your personal information directly from your employer, and we provide it to our appointed service providers so that they can provide the services agreed to in formal signed agreements. In terms of our formal signed agreements, we require all service providers to handle your personal information appropriately and securely and comply with all relevant laws.

Would you sell personal information?

No, the fund does not and will not sell personal information or provide your information to any third parties to use for their own marketing purposes.

It may be necessary for us to provide your information to comply with laws in South Africa, or if a court order is issued, but we only provide such information where there is a legal basis for doing so.

4 How do you protect and secure personal information?

We take the security of your information seriously. We have implemented appropriate technical and operational measures to:

- protect your information from loss, misuse, unauthorised access, disclosure, alteration and destruction
- ensure that all our service providers do

5 How long do you keep personal information?

We will keep your personal information for the time period necessary to comply with the registered rules of the fund and as set out in this privacy statement. It may be necessary to retain some of your personal information beyond this time to comply with laws or for historical and statistical purposes.

May I request the fund to delete my personal information?

Yes. Fill in **this form** which is issued in terms of POPIA for this process and send your request and this form to the Information Officer at: affundio@alexforbes.com. Please note that there may be legal requirements which prohibit us from deleting your information.

6 Will my personal information be transferred to other countries?

We use service providers who may store or process your information outside South Africa. We strive to ensure that our service providers only operate in countries with strong data protection laws (for example the United Kingdom or countries within the European Union) or are contractually required to protect your information in terms of the principles set out in POPIA.

7 Do you use cookies or other tracking technology?

The fund's website is used for information purposes only. We do not use any cookies or other technologies (such as web beacons or pixel tags) unless these are needed to make our website work (these are known as 'essential cookies'). Marketing cookies and third-party cookies are not included on our websites, and we do not use these to track your behaviour or for advertising purposes.



If you read the information provided and you have questions or need someone to speak to about your finances, please contact our **My Money Matters Centre** on:

Telephone: 0860 000 381

Email: mymoneymatters@alexforbes.com

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