

Data Protection Policy

Wealth Planners (Pty) Ltd is an FSCA-licensed independent financial planning practice registered as a financial services provider (FSP) number 37933 and has been mindfully partnering with clients since 2009. Wealth Planners is committed to the protection of your Personal Data. The Protection of Personal Information Act (POPI Act) prescribes eight specific principles for the lawful processing and use of personal information.

In a nutshell, the POPI Act principles are:

- The processing of information is limited which means that personal information must be obtained in a lawful and fair manner.
- The information can only be used for the specified purpose it was originally obtained for.
- The POPI Act limits the further processing of personal information. If the processing takes place for purposes beyond the original scope that was agreed to by the data subject, the processing is prohibited.
- The person who processes the information must ensure the quality of the information by taking reasonable steps to ensure that the information is complete, not misleading, up to date and accurate.
- The person processing the personal information should have a degree of openness. The data subject and the Information Regulator must be notified that data is being processed.
- The person processing data must ensure that the proper security safeguards and measures to safeguard against loss, damage, destruction and unauthorised or unlawful access or processing of the information, has been put in place.
- The data subject must be able to participate. The data subject must be able to access the personal information that a responsible party has on them and must be able to correct the information.
- The person processing the data is accountable for ensuring that the measures that give effect to these principles are complied with when processing personal information. What do we expect from employees Planners expect all employees to maintain the highest

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14 Draper Square
Draper Street, Claremont,
7708 South Africa

Postnet Suite 238
P. Bag X1005
Claremont, 7735 RSA

T +27 (0)21 671 8985
info@wealthplanners.co.za
www.wealthplanners.life

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VAT No. 4120258001
Reg. No. 2008/028185/07

standards in carrying out their business activities, adhering to legislative requirements and our policies on business conduct. Wealth Planners expects all employees to act professionally, honestly and ethically in all their dealings with clients, colleagues and third parties. Wealth Planners expects employees to act following the prescribed eight specific principles described above.

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