



ENGELI ENTERPRISE DEVELOPMENT (PTY) LTD – PRIVACY POLICY

PRIVACY NOTICE – PROTECTION OF PERSONAL INFORMATION ACT (“POPIA”)

We understand that your personal information is important to you and that you may be apprehensive about disclosing it. Your privacy is just as important to us, and we are committed to safeguarding and processing your information in a lawful manner.

We also want to make sure that you understand how and for what purpose we process your information. If for any reason you think that your information is not processed in a correct manner, or that your information is being used for a purpose other than that for what it was originally intended, you can contact our Information Officer.

You can request access to the information we hold about you at any time and if you think that we have outdated information, please request us to update or correct it.

Our Information Officer's Contact Details	
Name	Barry Wiseman
Contact Number	082 556 4266
Email Address:	bwiseman@engeli.co.za

Our details:

Engeli Enterprise Development (Pty) Ltd (Engeli)

7 Oakworth Road, South End, Port Elizabeth

Mobile: 082 556 4266

E-mail address: info@engeli.co.za

Engeli is an authorised financial services provider with FSP No 48139.

The source of collection of your personal information:

We collect personal information directly / indirectly from the following data subjects:

- Prospective clients who enquire about our services
- Clients who have agreed to make use of our services and/or solutions
- Existing clients who we currently provide services / solutions to

Personal information is collected directly/ indirectly from you through the completion of an application / engagement form, online forms, during consultation, direct requests etc.. Where relevant, forms are completed either electronically or in hard copy. You may also be requested to provide your personal information during your interaction with one of our staff.

We may also collect information about you from other sources such as external third parties.

Directors:

T. Hayter (Chairman), B. Boswell, A. Da Costa, Dr R. Dames , K. Jooste,
C. Maqina, S. Msebi, W. Oosthuizen, B. Wiseman
Registration Number: 2008/016022/07
FSP License No: 48139

Law authorising or requiring collecting of the personal information:

As an authorised financial services provider, we are obligated in terms of the following legislation to collect your personal information insofar as it relates to the rendering of the relevant financial services to you:

- Financial Advisory and Intermediaries Services Act 37 of 2002;
- Financial Intelligence Centre Act 38 of 2001;

Purpose for Processing your Information:

We collect, hold, use and disclose your personal information mainly to provide you with access to the services that we provide. We will only process your information for a purpose you would reasonably expect, including:

- Complying with the obligations contained in the contract concluded between yourself and Engeli
- Providing you with services that suit your needs as requested
- To verify your identity
- To notify you of new services or developments that may be of interest to you
- To confirm, verify and update your details
- To comply with any legal and regulatory requirements

Some of your information that we hold may include, your first and last name, email address, a home, postal or other physical address, other contact information, your title, birth date, gender, occupation, qualifications, past employment, residency status, assets and liabilities (strictly where relevant), income, expenditure and your banking details.

Failing to provide compulsory information may lead to Engeli's inability to carry out the functions necessary to perform as an authorised financial services provider.

Third parties and your personal information

We may need to share your information to third parties who provide advice, reports, analyses or services that you have requested. Where we share your information, we will take all precautions to ensure that the third party will treat your information with the same level of protection as required by us.

These third parties may include:

- Your employer (where applicable);
- The Compliance Officer of your company (where applicable);
- Analytics, search engine providers and web developers assisting in the enhancement of our website;
- Information Technology specialists assisting us with data storage, security, processing, analytics, etc.
- Your company auditors;
- Regulatory or governmental authorities such as the Financial Sector Conduct Authority and the Prudential Authority;

Complaints and objections

As a data subject, you have the right to –

- Request that we confirm, free of charge, whether or not we hold personal information about you;
- Request that we provide you with a description of the personal information we hold about you, and to explain why and how it is being processed

- Request that we consider your objections to the processing of your personal information
- Lodge a complaint with the Information Regulator

The Information Regulator

In the event that your personal information has not been processed in accordance with the POPI Act and the principles set out above, you have the right to lodge a complaint with the Information Regulator.

For further information regarding the complaints process, please visit the website of the Information Regulator, as indicated below.

Alternatively, you may contact the Information Regulator for further assistance:

The Information Regulator: Adv Pansy Tlakula

Physical Address: JD House, 27 Stiemens Street, Braamfontein, Johannesburg, 2001

Email: complaints.IR@justice.gov.za

Website: <https://www.justice.gov.za/inforeg/index.html>