

Privacy Policy

INVEST-ASSURED FINANCIAL PLANNING (PTY) LTD WEBSITE PRIVACY STATEMENT - EFFECTIVE 01-07-2021.

THIS PRIVACY STATEMENT FORMS PART OF THE INVEST-ASSURED FINANCIAL PLANNING (PTY) LTD WEBSITE TERMS AND CONDITIONS. IF YOU DO NOT AGREE WITH ANY TERM OF THIS PRIVACY STATEMENT, YOU MUST CEASE YOUR ACCESS OF THIS WEBSITE IMMEDIATELY.

1. Definitions and Interpretation

1.1. "INVEST-ASSURED FINANCIAL PLANNING (PTY) LTD" means the INVEST-ASSURED.

1.2. "Personal Information" means information relating to an identifiable, living, natural person and where it is applicable, identifiable, existing juristic person, including all information as defined in the Protection of Personal Information Act 4 of 2013.

1.3. "Processing" means the creation, generation, communication, storage, destruction of personal information as more fully defined in the Protection of Personal Information Act 4 of 2013.

1.4. "You" or the "user" means any person who accesses and browses this website for any purpose.

1.5. "Website" means the website of INVEST-ASSURED at URL www.invest-assured.co.za or such other URL as INVEST-ASSURED may choose from time to time.

2. Status and Amendments

2.1. INVEST-ASSURED respects your privacy. This privacy policy statement sets out INVEST-ASSURED information gathering and dissemination practices in respect of the Website.

2.2. This Privacy Policy governs the processing of personal information provided to INVEST-ASSURED through your use of the Website.

2.3. Please note that, due to legal and other developments, INVEST-ASSURED may amend these terms and conditions from time to time. The version of the terms and conditions effective for this Privacy Policy are indicated by the effective date incorporated in the title of this Privacy Policy. It is your duty to remain apprised of the current version of this Privacy Policy. The date indicated in the heading of this Privacy Policy is the effective date that governs the browsing and use of this Privacy Policy from that date until the next revision of this Privacy Policy becomes effective.

2.4. By continuing to browse or use this Privacy Statement after a revised Privacy Policy becomes effective constitutes your agreement to observe this Privacy Policy as may be revised.

3. Processing of Personal Information

3.1. INVEST-ASSURED may collect your personal information on the website using various means:

- 3.1.1. Subscribing to our newsletter.
- 3.1.2. Registering on our blog or forum.
- 3.1.3. Submitting your details via a contact form.
- 3.1.4. Through the personalisation of a website by a user.
- 3.1.5. The use of cookies.
- 3.1.6. Monitoring user access and habits.
- 3.1.7. Sending or receiving emails.
- 3.1.8. SMS's or other similar communication messaging.

3.2. By providing your personal information to INVEST-ASSURED you acknowledge that it has been collected directly from you and consent to its processing by INVEST-ASSURED.

3.3. Where you submit Personal Information (such as name, address, telephone number and email address) via the website (e.g. through completing any online form) the following principles are observed in the processing of that information:

3.3.1. INVEST-ASSURED will only collect personal information for a purpose consistent with the purpose for which it is required. The specific purpose for which information is collected will be apparent from the context in which it is requested.

3.3.2. To send you a quote or invoice you, we might collect your publicly available personal information from the Internet. For example, your address or VAT registration number.

3.3.3. We are required by law to verify the identity of our clients. As such we may ask you to provide us with various personal information.

3.3.4. INVEST-ASSURED will only process personal information in a manner that is adequate, relevant and not excessive in the context of the purpose for which it is processed.

3.3.5. Personal information will only be processed for a purpose compatible with that for which it was collected, unless you have agreed to an alternative purpose in writing or INVEST-ASSURED is permitted in terms of national legislation of general application dealing primarily with the protection of personal information.

3.3.6. INVEST-ASSURED will keep records of all personal Information collected and the specific purpose for which it was collected for a period of 5 (five) years from the date on

which it was last used.

3.3.7. INVEST-ASSURED will not disclose any personal information relating to you to any third party unless your prior written agreement is obtained or INVEST-ASSURED is required to do so by law.

3.3.8. If personal information is released with your consent INVEST-ASSURED will retain a record of the information released, the third party to which it was released, the reason for the release and the date of release, for a period of 5 (five) years from the date on which it was last used.

3.3.9. INVEST-ASSURED will destroy or delete any personal information that is no longer needed by INVEST-ASSURED for the purpose it was initially collected, or subsequently processed.

3.4. Note that, as permitted by the Electronic Communications and Transactions Act 25 of 2002, INVEST-ASSURED may use personal information collected to compile profiles for statistical purposes. No information contained in the profiles or statistics will be able to be linked to any specific user.

3.5. INVEST-ASSURED may use your personal information to:

3.5.1. Respond to your enquiries.

3.5.2. Provide you more information about our services.

3.5.3. Improve our service to you by analysing it for trends.

3.5.4. Invite you to attend events we hold.

3.5.5. Send you updates on the latest trends and new products we have in stock.

3.5.6. Send you marketing material (including electronic communications) relating to other industry information you might be interested in. You can unsubscribe at any time by clicking on the link in the communication we would have sent you, and thereafter we will not market to you.

3.6. Access to and Correction of Personal Information

3.6.1. You may access and correct, if necessary, your personal information that we hold by emailing us at john@invest-assured.co.za.

4. Collection of anonymous data

4.1. INVEST-ASSURED may use standard technology to collect information about the use of this website. This technology is not able to identify individual users but simply allows INVEST-ASSURED to collect statistics.

4.2. INVEST-ASSURED may utilise temporary or session cookies to keep track of users' browsing habits. A cookie is a small file that is placed on your hard drive in order to keep a record of your interaction with this website and facilitate user convenience.

4.2.1. Cookies by themselves will not be used to identify users personally but may be used to compile details of identified statistics relating to use of services offered or to provide INVEST-ASSURED with feedback on the performance of this website.

4.2.2. The following classes of information may be collected in respect of users who have enabled cookies:

4.2.2.1. The browser software used;

4.2.2.2. IP address;

4.2.2.3. Date and time of activities while visiting the website;

4.2.2.4. URLs of internal pages visited; and

4.2.2.5. referrers.

4.3. If you do not wish cookies to be employed to customize your interaction with this website it is possible to alter the manner in which your browser handles cookies. Please note that, if this is done, certain services on this website may not be available.

5. Security

5.1. INVEST-ASSURED takes reasonable measures to ensure the security and integrity of information submitted to or collected by this website, but cannot under any circumstances be held liable for any loss or other damage sustained by you as a result of unlawful access to or dissemination of any personal information by a third party.

6. Links to other websites

6.1. INVEST-ASSURED has no control over and accepts no responsibility for the privacy practices of any third-party websites to which hyperlinks may have been provided and INVEST-ASSURED strongly recommends that you review the privacy policy of any website you visit before using it further.

7. Queries

7.1. If you have any queries about this privacy policy, please contact us by emailing john@invest-assured.co.za