



FSP License No. 14065 2007/050189/23
courtyard Insurance Brokers CC.

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PRIVACY STATEMENT

1. RESPONSIBLE PARTY

Your broker is **Courtyard Insurance Brokers CC** with their place of business situated at 296 Trichardt Road, Parkdene, Boksburg, 1459.

2. INFORMATION OFFICER

Name: Zami Silva

Email address: zami@courtyardinsurancebrokers.co.za

Telephone number: 011 892 0843

3. PURPOSE OF COLLECTING PERSONAL INFORMATION

Your personal information will be processed for the following reasons in order to perform our mandate as your broker and as a financial intermediary including:

- assisting you to enter into one or more insurance agreement(s), as required, with insurers;
- providing you with financial advice, quotes on financial products and financial services;
- to verify your identity and to conduct credit reference searches;
- to issue, administer and manage your insurance policies;
- to obtain insurance quotations from various insurers;
- to deal with premiums;
- to process insurance claims and to take recovery action;
- to notify you of new products or developments that may be of interest to you;
- to confirm, verify and update your details;
- to carry out any instructions that pertain to your insurance policy and requests and requirements;
- To comply with any legal and regulatory obligations.

4. PROCESSING OF PERSONAL INFORMATION

The act of processing information includes any activity or any set of operations, whether or not by automatic means, concerning personal information and includes: the collection, receipt, recording, organisation, collation, storage, updating or modification, retrieval, alteration, consultation or use; dissemination by means of transmission, distribution or making available in any other form; or merging, linking, as well as any restriction, degradation, erasure or destruction of information.

The following Personal Information may be processed by your broker for the purposes set out above:

Full names and surname; identity and/or passport number; home and/or business address; proof of income such as your payslip; bank statements; marital status; contact details; banking details; assets; race; gender; liabilities; occupation; birth date; gender; title; insurance history; claims history; company name and company registration number; whether the policyholder and/or data subject is a company; main place of business and contact details where the policyholder or data subject is a company including liabilities, assets, information on how the business trades or their main trade of business; name, surname, address and identity number of the director(s) and/or member(s).

The above personal information will be supplied by you or by third parties for the purposes stated above.

The personal information may also be accessed through third parties such as the Companies and Intellectual Property Commission portal, credit bureaus and other insurance companies. The supply of the above information is required for you to be able to enter into and maintain insurance agreements with the insurer.

5. RECIPIENTS OF PERSONAL INFORMATION

The following persons may be recipients of the personal information that is being processed:

(The list below is not intended to be exhaustive)

- our staff members;
- insurance and reinsurance companies;
- third party compliance officer/consultant;
- industry bodies;
- regulatory bodies;
- state institutions;
- service providers such as specialist investigators and loss adjusters;
- premium collection agencies;
- Insurance operating systems operators.

The recipients and third parties are also required to take precautions to treat your personal information confidentially and with the required security measures and protocols.

Your personal information may be hosted on servers and processed by recipients and third parties who may be located outside of the Republic of South Africa.

6. RIGHT TO ACCESS PERSONAL INFORMATION

You can request access to the personal information that Courtyard Insurance Brokers CC holds about you and if you find that we have incorrect or outdated information, you may request us to update or correct it. For that effect, kindly contact your broker's information officer.

7. RIGHT TO RECTIFY PERSONAL INFORMATION

You have the right to request that your personal information be corrected or even deleted where Courtyard Insurance Brokers CC is no longer authorised to retain the personal information.

8. RIGHT TO OBJECT TO THE PROCESSING OF PERSONAL INFORMATION

If, on reasonable grounds, you object to the processing of your personal information, due consideration will be given to the request and the requirements of POPIA. We may cease to use or disclose your personal information and may, subject to any statutory and contractual information with regards to retention rights or requirements, also destroy the personal information no longer lawfully required.

9. SECURITY PROTOCOLS

All personal information collected will be stored and maintained on secure servers with only authorised personnel allowed access to the personal information for purposes of maintaining and processing your policy, claims or complaints you may have. Courtyard Insurance Brokers CC will take appropriate, reasonable technical and organisational measures to avoid loss of or unlawful access to your personal information.

10. COMPLAINTS

Should you have any complaints, kindly email **Courtyard Insurance Brokers CC** at zami@courtyardinsurancebrokers.co.za; you may also email the Information Regulator at complaints.IR@justice.gov.za in the event that we are unable to resolve the complaint to your satisfaction.