



PRIVACY  
POLICY



JUNE 2023

# PERSONAL INFORMATION REQUIRED BY THE COMPANY

1

F and I Products and Consulting (Pty) Ltd (“the Company or Auto F and I”) Personal Information Protection Policy governs the Processing of your Personal Information. The Policy must be approved by CEO David Horner.

2

You may view the Personal Information Protection Policy by contacting the Information Officer on [gerda@auto-sure.net](mailto:gerda@auto-sure.net) or on 031 566 2226.

3

“Personal Information” is defined in the Protection of Personal Information Act (Act no. 4 of 2013) (“POPIA”) as Information relating to an identifiable, living, natural person, and where it is applicable, an identifiable, existing juristic person, including, but not limited to:

- a. information relating to the race, gender, sex, pregnancy, marital status, national, ethnic or social origin, color, sexual orientation, age, physical or mental health, wellbeing, disability, religion, conscience, belief, culture, language and birth of the person;
- b. information relating to the education or the medical, financial, criminal, or the employment history of the person;
- c. any identifying number, symbol, e mail address, physical address, telephone number, location information, online identifier or other particular assignment to the person;
- d. the biometric information of the person;
- e. the personal opinions, views or preferences of the person;
- f. correspondence sent by the person, that is implicitly or explicitly of a private or confidential nature or further correspondence that would reveal the contents of the original correspondence;
- g. the views or opinions of another individual about the person; and
- h. the name of the person if it appears with other personal information relating to the person or if the disclosure of the name itself would reveal information about the person.”

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## 4

“Processing” is defined in POPIA as follows

Any operation or activity or any set of operations, whether by automatic means, concerning personal information, including:

- a. the collection, receipt, recording, organisation , collation, storage, updating or modification, retrieval, alteration, consultation or use;
- b. dissemination by means of transmission, distribution or making available in any form; or
- c. merging, linking, as well as restriction, degradation, erasure or destruction of information;”

## 5

The Company is a Responsible Party in respect of the Personal Information you (Data Subject) provide to the Company. The Company processes the following types of Personal Information:

- client’s identity number, name, surname, address, postal code
- any other information required by us, suppliers and insurers in order to provide clients with an accurate analysis of their insurance needs.



# REASONS FOR REQUIRING PERSONAL INFORMATION

**Clients Personal Information will only be used for the purpose for which it was collected and agreed.**

This may include:

- Providing products or services to clients and to carry out the transactions requested;
- Assessing and processing claims
- Confirming, verifying and updating client's details;
- For purposes of claims history;
- For the detection and prevention of fraud, crime, money laundering or other malpractice;
- Conduction market or customer satisfaction research;
- For audit and record keeping purposes;
- In connection with legal proceedings
- Providing our services to clients to carry out the services requested and to maintain and constantly improve the relationship;
- Providing communications in respect of Auto F and I and regulatory matters that may affect clients; and
- In connection with and to comply with legal and regulatory requirements or when it is otherwise allowed by law.

# PROCESSING OF PERSONAL INFORMATION

In terms of the provisions of POPI, Personal Information may only be processed if certain conditions are met which are listed below along with supporting information for Auto F and I processing for Personal Information:

- Client consents to the processing – consent is obtained from clients during the introductory, appointment and needs analysis stage of our relationship;
- The processing is necessary – in order to conduct an accurate analysis of client’s insurance needs, certain Personal Information required;
- Processing complies with an obligation imposed by law on Auto F and I – The Financial Advisory and Intermediary Services Act (“FAIS”) requires Financial Service Providers (“FSPs”) to conduct a needs analysis and obtain information from clients about their insurance needs in order to provide them with applicable and beneficial products.
- Processing protects the legitimate interest of the client – it is in the client’s best interest to have a full and proper needs analysis performed in order to provide them with an applicable and beneficial product, this requires obtaining Personal Information;
- Processing is necessary for pursuing the legitimate interest of Auto F and I or of a third party to whom information is supplied. In order to provide our clients with products we, suppliers and insurers need certain personal information from clients to make an expert decision on the specific product they require.

## DURATION OF PERSONAL INFORMATION KEPT

Under South African law, the Company is required to keep Personal Information for a 5 year period following the date of termination of the business relationship according to the Company’s Personal Information Retention Policy.

After this period, Personal Information will be kept for so long as it is required to honour contractual relationships.

# WHAT ARE YOUR RIGHTS

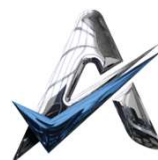
1. Should you believe that any of your Personal Information held by the Company is incorrect or incomplete, you have the right to request to view this information, rectify it or have it deleted.

Please contact the Company's Information Officer on [compliance@auto-sure.net](mailto:compliance@auto-sure.net) should this be required.

2. Additionally, if you wish to complain about how the Company has handled your Personal Information, please contact the Information Officer on [compliance@auto-sure.net](mailto:compliance@auto-sure.net). The Company's Compliance Department will investigate your complaint and contact you within 2 business days of the complaint being lodged and work with you to resolve the matter.
3. If your query relating to your Personal Information is not, in your opinion, adequately dealt with, you can contact the Information Regulator on 012 406 4818 or [infoereg@justice.gov.za](mailto:infoereg@justice.gov.za) to file an official complaint.



**Chief Executive Officer**  
David Horner



**Operations Manager**  
Gerda le Roux