OWN YOUR WEALTH SOLUTIONS (Pty) Ltd
FSP No 54342 / ORG 52265 / BR 50517

Authorised Financial Services Provider
Reg No: 2023/632348/07 B-BBEE Status Level 1
Cell No: 083 275 3205
Email: renney@oyws.co.za
Address: 9 Umbrella Palm Lane, Crossmoor, Chatsworth, Durban, 4092

Empowering Your Finances, Securing Your Future.

OWN YOUR WEALTH SOLUTIONS
OYWS
www.oyws.co.za

PERSONAL INFORMATION PROCESSING CONSENT FORM

Financial Services Provider	OWN YOUR WEALTH SOLUTIONS (PTY)LTD
FSP No.	54342

"We respect your privacy and are committed to protect and responsibly manage your personal information. To comply with the new Protection of Personal Information (POPI) Act, we require your consent and authorisation to process your personal information, including your special personal information as defined by the POPI Act, which we collect and process to enable us to provide the services, assistance and/or product solutions you may require. The POPI Act defines the "**processing**" of personal information as:

"**…** any operation or activity or any set of operations, whether or not 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 other form; or
(c) merging, linking, as well as restriction, degradation, erasure or destruction of information."

We will collect the minimum required information from you and we will process your personal information only for the purposes for which it was collected or as agreed with you. These purposes include:

- To provide our advice, services, and products to you, to help you take out or maintain financial products and/or carry out the transactions you requested, as well as to maintain our contractual relationship;
- To assist you with queries and/or claims relating to your financial products or financial plan;

- To confirm and verify your identity or to verify that you are an authorised user for security purposes, where applicable;
- For audit and record-keeping purposes.

Apart from the above reasons, we will also process your personal information to comply with legal and regulatory requirements or industry codes to which we subscribe or which apply to us, or when it is otherwise allowed by law.

There will be times when we may need to share your personal information with third-party service providers and/or operators (e.g. insurance companies, investment companies, our auditors, etc.) who will be involved in the delivery of products or services to you or us, in support of our service offerings to you and our business. An 'operator' is defined by the POPI Act as: "…a person who processes personal information for a responsible party in terms of a contract or mandate, without coming under the direct authority of that party". We are the responsible party for your personal information.

There are also times when we will use the information systems of these third-party operators to process your personal information to help us in providing you with the required advice and/or products and services. These systems currently include but are not limited to:

- Sanlam
- Sanlam Legacy
- PPS Risk/Investments/Profmed/PPS Short Term, Personal Lines, Commercial Lines
- PPS GLU Mutual Non-Professionals
- Hollard
- Liberty Life
- Discovery Life, Investments, Med Aid and Short Term
- Old Mutual
- Momentum
- INN8
- Quicksure
- Sanlam Gap Cover
- Zestlife Gap Cover
- Stratum Gap Cover

We are required by law to have agreements in place with these operators to ensure that they protect and process personal information securely.

As a client, you have the right, at any time:

- to ask us to update, correct, or delete your personal information, which includes the authority and consent provided in this form;
- to object to the processing of your personal information;
- to withdraw your consent;
- to complain to the Information Regulator, whose contact details are Tel: 012 406 4818/ Email: inforeg@justice.gov.za.

Please discuss or clarify any uncertainties in this regard with us before signing.

CONSENT AND AUTHORISATION:

I, _____(name and surname), ID number:_____ understand and consent and:

Authorise and give Own Your Wealth Solution (Pty)Ltd, and/or his/her/its representatives and/or relevant operators permission to process my personal information for the purposes mentioned in this document or otherwise allowed for or required by law:	Yes	No	Full signature:	Date:
Authorise that Own Your Wealth Solution (Pty)Ltd, and/or his/her/its representatives may contact me from time to time to offer additional services or solutions to me:	Yes	No	Full signature:	Date:
Authorise and give Own Your Wealth Solution (Pty)Ltd, and/or his/her/its representatives and/or relevant operators permission to transfer my personal information to a third party in a foreign country, only for the purposes mentioned in this document:	Yes	No	Full signature:	Date: