



Phakama Administration Services (Pty) Ltd (FSP 1473)

Protection of Personal Information (POPI) Privacy Notice

PROTECTION OF PERSONAL INFORMATION ACT (“POPIA”)

PRIVACY NOTICE

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 or Deputy 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You can request access to the information we hold about you at any time and if you think that we have outdated information, please request us to update or correct it.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	Elsie van Tonder
Contact Number	012 348 8310
Email Address:	compliance@phakama.co.za
Our Deputy Information Officer’s Contact Details	
Name	Myra Grobler
Contact Number	012 348 8310
Email Address:	compliance@phakama.co.za



REGISTRATION CERTIFICATE

Registration Number: 0001786/2023-2024-IRR/PR

This is to certify that **Elsie Dorothea Van Tonder** has been registered as the **Information Officer** and **Myra Grobler** has been registered as **Deputy Information Officer** with the Information Regulator by **Phakama Administration Services (Pty) Ltd**, in terms of section 55(2) of the Protection of Personal Information Act 4 of 2013 with effect from **20 February 2023**.

Our details:

Phakama Administration Services (Pty) Ltd

Greenhill Village Office Park, Ground Floor Candlewood Building, c/o Nentabos and Botterklapper Street, Pretoria, 0184

Tel: 012 348 8310

Fax: 086 514 1115

E-mail: compliance@phakama.co.za

The Organisation is an authorised financial services provider with FSP no. 1473. We render financial services in the following product categories:

1	Category I	Intermediary service
1.1	Long-term Insurance: Category A	X
1.2	Short-term Insurance: Personal Lines	X
1.3	Long-term Insurance: Category B1	X
1.20	Long-term Insurance: Category B2	X
1.4	Long-term Insurance: Category C	X
4	Category IV	Intermediary service
4.1	Assistance business FSP	X

The source of collection of your personal information:

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

- Prospective clients who enquire about our administrative services
- Clients who have appointed the insurer as their underwriter
- Policyholders who enter into a policy with an insurer via their authorised financial service providers
- Insurers who have appointed us as their administrator

Personal information is collected directly or indirectly from you through the completion of an application form, an online application, or data provided to us by the insurer or Financial Service Provider, where you have signed up for the service or an insurance product. These forms are completed either electronically or in hard copy. You may also be requested to provide your personal information during your consultation with an authorised financial service providers representative, agent or broker.

We may also collect information about you from other sources, such as external third parties, when performing the necessary FICA due diligence checks.

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;
- Insurance Act 18 of 2017;
- Short-Term Insurance Act 53 of 1998;
- Long-Term Insurance Act 52 of 1998;

Purpose for Processing your Information:

We collect, hold, use and disclose your personal information mainly to provide you with access to the services and products that are provided to you. 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 the authorised financial service provider
- To verify your identity and to conduct due diligence
- To administer and manage your insurance policies
- To process insurance claims
- 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, residency status, source of income, relation information, medical information and your banking details.

Some of the aforementioned personal information may be mandatory to provide within the context of product providers' underwriting requirements and disclosures.

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

Third parties and your personal information

We may need to share your information with third parties to provide advice, reports, analyses, and products 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 the organisation (where applicable);

- Information Technology specialists assisting us with data storage, security, processing, analytics, etc;
- Auditors of the Organisation;
- Regulatory or governmental authorities such as the Financial Sector Conduct Authority and the Prudential Authority.

The Transfer of your personal information outside of the Republic of South Africa

Your information is only hosted on servers managed within the borders of South Africa.

Complaints and objections

As a data subject, you have the right to –

- 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 (please complete the access to information form on our website);
- Request that we consider your objections to the processing of your personal information (please see fee for access of personal information request document on our website);
- Lodge a complaint with the Information Regulator at POPIAComplaints@inforegulator.org.za.

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 above.