

Data Protection Policy

Effective Date: 1 September 2018

Welcome.

Wealth Planners (Pty) Ltd is an FSCA licensed independent financial planning practice registered as a financial services provider (FSP) number 37933 and has been mindfully partnering with clients since 2009.

Wealth Planners is committed to the protection of your Personal Data.

The Protection of Personal Information Act (POPI Act) prescribes eight specific principles for the lawful processing and use of personal information. In a nutshell, the POPI Act principles are:

1. The processing of information is limited which means that personal information must be obtained in a lawfully and fair manner.
2. **The information can only be used for the specified purpose** it was originally obtained for.
3. The POPI Act **limits the further processing** of personal information. If the processing takes place for purposes beyond the original scope that was agreed to by the data subject, the processing is prohibited.
4. The person who processes the information must **ensure the quality of the information** by taking reasonable steps to ensure that the information is complete, not misleading, up to date and accurate.
5. The person processing the personal information should have a degree of openness. The data subject and the Information Regulator must be notified that data is being processed.
6. The person processing data must ensure that the proper security safeguards and measures to safeguard against loss, damage, destruction and unauthorised or unlawful access or processing of the information, has been put in place.
7. The data subject must be able to **participate**. The data subject must be able to access the personal information that a responsible party has on them and must be able to correct the information.
8. The person processing the data is accountable to ensure that the measures that give effect to these principles are complied with when processing personal information.

What do we expect from employees

Wealth Planners expects all employees to maintain the highest standards in carrying out their business activities, adhering to legislative requirements and our policies on business conduct. Wealth Planners expects all employees to act professionally, honestly and ethically in all their dealings with clients, colleagues and third parties. Wealth Planners expects employees to act in accordance with the prescribed eight specific principles described above.

Get in touch

Please address any questions to the Data Protection Officer at info@wealthplanners.co.za.