

PRIVACY NOTICE

Exceed Trust Proprietary Limited has to collect certain personal information to enable us to offer and continue our service. It is a requirement of the Protection of Personal Information Act No 4 of 2013 that we inform you, our valued client, of certain aspects concerning information collection. **Please read this notice carefully and make sure you understand which information, why and how we have to handle the information.** We strive to secure and protect your personal information to the best of our ability.

By providing us with your Personal Information, you agree to this Policy and authorise us to process such information as set out herein and you authorise Exceed Trust and associated entities or third parties (where applicable) for the purposes set out herein.

We collect information for the following purpose:

The information we collect is for the sole purpose of offering you the service or product you approached us for. This will be used to communicate with you and give you recommendations or proposals on what we can offer; once accepted, the information will be used to meet our obligations in terms of our service agreement.

Information given will be voluntary for us to fulfill your instructions, except where required in terms of legislation for us to meet our requirements.

Where information that is supplied to us is incorrect, false, misleading, inaccurate or not supplied at all, it may lead to less than beneficial advice, incorrect actions taken, the suspension of services or even legal consequences for which we will not be liable. We can only act on information received.

Information we will/can request:

- 1.1. We collect information through information received from you on request, through application forms completed, e-mail requests, other written requests or by phone.
- 1.2. Personal details such as full names, title, contact details, email address, physical and postal address, identification number, SARS number, company name, legal entities' registration numbers, directors, shareholders, members, trustees, beneficiaries, etc.
- 1.3. Financial information needed to give advice.
- 1.4. Information of employees.
- 1.5. Information gathered when using a website, such as IP address.

- 1.6. Other information that you provide to us when you make use of our services or products.
- 1.7. Where information is required from children (under 18's) the competent guardian or parent consents that we may gather the information as detailed above from the children.

Information sharing or transfer to third parties in South Africa and/or across borders:

In general, we do not share your Personal Information with third parties (other than service providers acting on our behalf) unless we have a lawful basis for doing so.

Where information is shared across borders, it will only be done where necessary to fulfill our service and to countries that have similar or better safeguards, security, and protection in place for personal information.

Where information is shared or transferred in South Africa, it will only be done where an agreement is in place between the parties to ensure that the protection of information is like ours or where it is part of the service to submit to a Regulator or Authority on your behalf (the client) without said agreement.

Where practical or to make it easier for you as our client, we may procure or provide information from/to third parties. These may include:

- 2.1 Online platforms/online software to enter and process your information for business management services. We also have agreements in place to ensure that they comply with the privacy requirements as required by the Act.
- 2.2 Where we have a duty or a right to disclose in terms of legislation, regulations or industry codes.
- 2.3 When explicitly requested by you.
- 2.4 With Professional Advisers.
- 2.5 To law enforcement, regulatory and other government agencies and to professional bodies, as required by and/or in accordance with applicable law or regulation.
- 2.6 Where we believe it is necessary to protect our rights.

You, the client, have certain rights

- 3.1 The right to be fully informed of what data we collect, why we collect the data, and whether we intend to transfer it.
- 3.2 The right to access your data and correct or update any errors.
- 3.3 The right to deletion or destruction of information.
- 3.4 The right to a notification of a data breach/security compromise.
- 3.5 The right to restrict the use/processing of personal information.
- 3.6 The right to object to processing of personal information for certain purposes.
- 3.7 The right to have information transferred to a third party on request from the data subject

(the client).

3.8 The right to lodge a complaint with the Regulator at <https://www.justice.gov.za/inforeg/> or complaints.IR@justice.gov.za.

Information Security

At Exceed, we have implemented the necessary protection to stop and detect unauthorised access and use of Personal Information. As part of our internal processes and procedures, we will continue to review our security measures to ensure that your Personal Information remains secure.

Generally accepted standards of technology and operational security have been implemented to protect information from loss, misuse, alteration, or destruction.

All our employees receive regular training on information security and as part of their employment contract are obliged to treat all information as strictly confidential. Only authorised persons have access to personal information.

Retention of personal information:

We shall only retain and store Personal Information for the period for which the data is required to serve its primary purpose or a legitimate interest or for the period required to comply with an applicable legal requirement, whichever is longer.

Getting in touch

If you would like to:

- Know more about this notice
- Withdraw your consent
- Access your information
- Amend/correct your information

Please refer to our website for contact numbers or e-mail your account manager.

Physical address:

Exceed Trust (Pty) Ltd
FFG Building, 1st Floor
No 73 Berg River Boulevard
Paarl
7646

Email:

paarl@exceed.co.za

Website:

www.exceed.co.za