

HEREN RAMAWTAR ASSURES POPI CONSENT

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.

You can request access to the information we hold about you at any time and if you think that we have outdated information, please request us to update or correct it.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	Avanti Ramawtar, CFP®
Contact Number	083 607 4208
Email Address	avanti@lifeguru.co.za

Purpose for Processing your Information

We collect, retain, use and disclose your personal information mainly to provide you with access to the services and products that we provide. We will only process your information for a purpose you would reasonably expect, including:

- Providing you with financial planning advice, products and services that suit your needs as requested
- To verify your identity, confirm and update your details
- To issue, administer and manage your insurance policies, investments and retirement needs, and to process insurance claims and to take recovery action
- To notify you of new products or developments that may be of interest to you
- To comply with any associated 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, qualifications, past employment, residency status, your investments, assets, liabilities, insurance, income, expenditure, tax information, family history, medical information and your banking details.

Consent to Disclose and Share your Information

We may need to share your information to provide advice, reports, analyses, 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. Your information may be hosted on servers

I hereby authorise and consent to the organization sharing my personal information	
Name	
Signature	
Date	