

NOBLE FINANCIAL ADVISORS CLIENT PRIVACY NOTICE

This notice was updated on 21 November 2024.

This privacy notice informs you how we collect and use your personal information when you use our services and become our client. This notice may change, but we will let you know when it happens.

1. WE COLLECT AND USE YOUR PERSONAL INFORMATION

We collect the following personal information from you when you complete the questionnaire we provide you with to enable us to do financial planning for you:

- First name and surname;
- Contact details;
- Current employment details;
- Identity number;
- Bank account details;
- Spouse's details;
- Marital status;
- Spouse's employment details;
- Dependants' information;
- Views, preferences, and opinions;
- Goals, needs, and priorities;
- Your and your spouse's current financial information;
- Your health;
- Education;
- Copy of will; and

Noble Financial Advisors_Client Privacy Notice

- Guardian details for your child.

When you require medical aid, we will ask you to complete a medical aid needs analysis. We collect the following additional personal information on this form so we can recommend a suitable medical aid or plan option:

- Date of birth;
- Medical aid history;
- Medical history;
- Gap cover preferences;
- Type of cover required; and
- Plan options and preferences.

We collect and process your personal information to meet our contractual obligations to you and to comply with applicable legislation; for example, we collect copies of your Identity document and proof of address to comply with FICA requirements.

When you complete the questions under the client mandate section in the service agreement, we collect your preferences on the type of services you require, your name and surname, and your signature.

When you contact us by email or through any of our social media platforms, we only collect the personal information you provide us with so we can respond to your message or query and manage our relationship with you.

2. WE SHARE YOUR PERSONAL INFORMATION WITH OUR TRUSTED SERVICE PROVIDERS

We use trusted service providers to help us run Noble Financial Advisors. They have agreed to keep your personal information secure and confidential and to only process it for the purposes for which we share it with them.

Sometimes, the law requires that we share your personal information, such as to comply with tax laws.

3. WE DO NOT KEEP YOUR PERSONAL INFORMATION FOR LONGER THAN WE NEED TO

We must keep your personal information for as long as we have a relationship with you, as long as we need it for operational reasons, or as long as the law requires.

4. WE HAVE TAKEN REASONABLE STEPS TO MINIMISE THE IMPACT OF A BREACH

We have put in place reasonable security measures to protect your personal information from being:

- Lost;
- Used in the wrong way or for the wrong reasons;
- Accessed without authorisation;
- Changed; and
- Destroyed.

Although no system is flawless, and a breach of our physical, technical, or organisational safeguards cannot be completely ruled out, we will conduct regular security checks on our systems.

If something should happen, we have taken steps to minimise the threat to your privacy. We will let you know if your personal information has been compromised or how you can help minimise the impact of the breach.

If you suspect that we (or you) have had a security breach, please let us know immediately by sending an email to:

shelley@nobleadvisors.co.za

Please provide as much detail as possible about the incident in your email.

5. YOUR RIGHTS AND PREFERENCES

As a data subject, you have the right to:

Noble Financial Advisors_Client Privacy Notice

- Ask what we know about you;
- Ask what personal information we send to our service providers or anyone else;
- Ask us to correct, delete, or destroy any out-of-date or incorrect personal information about you;
- Object to our use of your personal information;
- Ask us to restrict our processing of your personal information; and
- Complain to the [Information Regulator](#) if you feel we are not processing your personal information in compliance with the Protection of Personal Information Act 4 of 2013 (POPIA).

Our response time to your request can be up to 21 days because we must follow internal procedures. To verify your details, we may request further information or proof of your identity or valid proof of residence.

6. CONTACT US

If you have any questions, please feel free to contact us at:

shelley@nobleadvisors.co.za