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CK 89/15010/23

**Denise Mason**

FSCA No. 7086

*Authorised Financial Service Provider  
Member of IIER (Insurance Institute of East Rand)*



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## PRIVACY POLICY

CK Insurance Brokers cc is committed to protecting your privacy

I am a Financial Service Provider and in order to meet your Insurance needs, collect personal information about yourself or Business. This information identifies you.

I appreciate that you do not want the personal information you provide to us distributed indiscriminately. This information depends on what we receive and update from you.

I understand my responsibility to handle your personal data with care, keep it securely and to comply with the relevant and applicable data protection acts. Your Personal Data will only be used in accordance with this Privacy Notice. Safeguards are implemented to protect the integrity of the data and to prevent unauthorised modification or destruction. Electronic transmission of data has risks which cannot be totally obviated.

### Data protection obligations

- \* Used lawfully, fairly and in a transparent way
- \* Collected only for valid purposes in relation to any insurance I have been requested to arrange on your behalf, or to deal with any mid-term changes or claims under the policy
- \* Kept secure and confidential
- \* kept only as long as is necessary - 5 years after contact has ended then destroyed/deleted
- \* Accurate and up to date

### What Personal Data may be collected

For CK Insurance Brokers cc to provide Insurance quotes, insurance policies and/or deal with any claims or complaints, I need to collect, retain and process Personal Data about you. This data may be collected whilst arranging insurance cover for you when the Proposal/needs analysis is done.

Individual details: Name, address, telephone numbers, email address, gender, marital status, Identity number, title, family details (Spouse or co-insureds)

Financial information: Signed Debit Order form

Risk details: Information about you which I and other Insurers need to collect to assess the risk to be insured and provide a quote, this may include data relating to any criminal convictions or other categories of personal data.

Policy information: Information about quotes you have received and policies you have taken out through other Insurers.

Previous and current claims: Information about previous and current claims.

Information provided to third parties who provide services in regard to underwriting, surveys, claims, or other parties in connection with your financial products. They are also bound by the privacy and confidentiality required in terms of the Protection of Personal Information Act, (POPI Act) as well as the Financial and Intermediary Services Act.

**Quotation / Inception:**

- \* Evaluate, process and complete your requests and /or applications for products and services
- \* Security and Verification of your identity
- \* Payment of premium where the insured/policyholder is an individual

**Policy administration:**

- \* Client care, including communicating with you and sending you updates
- \* to update my records and maintain your policy
- \* To develop and improve the available products or services
- \* Payments to and from individuals

**Claims Processing:**

- \* Managing insurance claims

**Renewals:**

- \* Contact the insured/policyholder to renew the insurance policy
- \* Evaluate the risks to be covered and premium

**Other purposes:**

- \* Provide specific information to our regulators and other government bodies to ensure that I adhere to the regulatory, ;egal and compliance obligations
- \* Meet the FICA regulatory obligations to prevent and detect fraud, money laundering and other financial crimes

**Lawful Purpose:**

- \* The lawful purpose for which your personal data will be processed:
  - Necessary for the performance of an insurance contract
  - The legitimate interests or your explicit consent
  - Legal and Regulatory obligations

**Storage of Info:**

- \* Each file has their own file
- \* Info is stored electronically under clients name
- \* Info is backed up to external drive
- \* Info is backed up to Google Drive Account