

BOUTIQUE INVESTMENT PARTNERS PTY LTD (“BIP”) PRIVACY NOTICE

Purpose

BIP will maintain the confidentiality of your personal information and comply with the Protection of Personal Information Act 4 of 2013 (POPIA) when processing your personal information. The purpose of this notice is to inform our clients about the type and use of personal information that we collect, the ways in which it is collected, the sharing, protection, and storage thereof.

Type of Personal Information Collected

Personal information collected by BIP can include your name, contact details, birth date, identity number, employment details, bank account number, financial information etc.

How does BIP collect personal information?

BIP collects personal information either directly from the client or through financial services intermediaries. In certain instances, BIP may appoint third parties to collect information on its behalf.

Use of personal information:

After obtaining consent, the personal information collected or held by BIP may be used, stored, transferred, disclosed or shared for the following purposes:

- Providing financial and intermediary services;
- Providing discretionary financial services;
- Processing applications for financial services delivery;
- Processing complaints or claims;
- Providing ongoing administration services for the duration of the contract;
- Fulfilling a transaction on request of a client; or
- If permission is given, BIP may use your personal or other information to tell you about products and services.

Personal information collected from our website:

BIP respect your rights to confidentiality and privacy, and we will do all things reasonably necessary to protect your rights of privacy whilst using the website.

Personal information disclosed when making a compliant or an enquiry will only be used for the express purpose for which it was intended. It will not be made available to any third party unless it is to perform specific functions on our behalf like technical support. Such parties shall however not be entitled to use your information for any purpose other than the function for which they were employed.

Non-personal information that we may record:

During your visit to our website, our operating system may automatically record some general information about your visit. Information recorded by our operating system may include:

- The internet domain for your internet service;
- The type of browser that you are using;
- The type of operating system that you are using;
- The date and time of your visit, as well as the specific pages that you visited;
- The address of the previous website that you were visiting if you landed on our website through a link on another website.

The information that may be recorded in terms of this paragraph is used for statistical analysis, the ultimate intention of which is to make our website as useful and user-friendly as possible. Please note that the above list may vary and be updated from time to time, but no personal information about any individual visiting our site, will be recorded in this manner.

Sharing of personal information

If you give us consent, BIP may share your personal information with persons or organisations outside BIP. Where BIP discloses personal information to intermediaries, other financial institutions or any other third parties, the third parties will be obliged to use that personal information only for the reasons and purposes it was disclosed for. BIP may be obliged to disclose your personal

information to the extent that it is required to do so by law, in connection with any legal proceedings or prospective legal proceedings, or for the purposes of protecting the interest of clients, for example fraud prevention or to give effect to an agreement.

Securing personal information

BIP will take all reasonable technical and organisational precautions to prevent the loss, misuse, or alteration of your personal information. We will store all the personal information in secured environments, for example on secured servers in a protected data centre.

How you can review and correct your personal information:

You can request to review your personal information contained in BIP's records at any time to correct or update the information. If the purpose for which your personal information was requested initially does not exist anymore, for example you no longer have a contract, you may request information held by the company to be removed. However, BIP may decline your request to delete the information from its records if other legislation requires the continued retention thereof or if it has been de-identified.

Links to other sites:

Our website may include links to other websites which we believe might be of value to you. Should you follow any of these links, you may be directed to websites which are beyond our control. Accordingly, our Privacy Policy does not apply to these external links or the websites visited by following these links. If you visit a website that is linked to our site, you should consult that site's privacy policy before providing any personal information.

If you have any questions or comments about our Privacy Notice, please contact us on compliance@bcis.co.za