

Bay Wealth Management

CERTIFIED FINANCIAL PLANNER® PRACTITIONERS

THE PROTECTION OF PERSONAL INFORMATION (POPI) ACT

The Protection of Personal Information (POPI) Act requires us to inform you how we use, disclose and destroy personal information we obtain from you. We are committed to protecting your privacy and will ensure that your personal information is used appropriately, transparently, securely and according to applicable law.

I, the undersigned, hereby consent to the following:

1. My personal information may be collected, processed, recorded, used and must be safeguarded during the rendering of financial services to me by Bay Wealth Management (Pty) Ltd – FSP number 14451 (hereinafter referred to as the FSP).
2. The FSP may also add to my personal information, with information received from other product providers and third parties in order to offer a more comprehensive and appropriate service to me.
3. The FSP may verify, share and disclose my personal information to their product providers and third-parties whose services or products they use in order to adequately and appropriately render financial services to me.
4. The FSP may also collect and processes my personal information for the FSP's own marketing purposes to ensure their products and services remain applicable and appropriate.

Furthermore, I understand that:

1. I have the right to access my personal information which the FSP holds.
2. I have the right to ask the FSP to update, correct or delete my personal information on reasonable grounds.
3. Once I object to the FSP processing my personal information, the FSP may no longer process my personal information, within reasonable parameters unless to conclude a transaction or outstanding business.
4. Should I wish to withdraw my consent to process my personal information, I must do so in writing, addressed to the FSP Information Officer.
5. Once I withdraw my consent for the FSP to process my personal information, I understand that the FSP is still obliged under other legislation to keep the information for 5 years after termination of the relationship between the FSP and myself.
6. The FSP may disclose my information where they have a duty or a right to disclose in terms of applicable legislation or where it may be necessary under any other law.

SIGNED AT ON THIS DAY OF 20.....

.....
Client Signature:

Bay Wealth Management (Pty) Ltd

Reg No: 2009/004616/07

232 Cape Road | Mill Park | Port Elizabeth | 6001

Tel: +27 (0) 41 374 0026

Email: info@baywealth.co.za

Directors: A. Mestre (Managing); T. Mestre

Bay Wealth Management (Pty) Ltd. is an authorised FSP in terms of the FAIS Act, 2002 (14451).



www.baywealth.co.za