

POPIA CONSENT AND PRIVACY POLICY

DAAN SCHOEMAN FINANCIAL PLANNING SOLUTIONS (PTY) LTD PRIVACY POLICY

EFFECTIVE DATE: 15 DECEMBER 2025

1. Introduction

Welcome to Daan Schoeman Financial Planning Solutions (PTY) LTD ("we," "us," or "our"). We are committed to protecting your privacy. This Privacy Policy explains how we collect, use, disclose, and safeguard your information when you visit our website, use our services, or engage with us. By using our website and services, you agree to the terms of this Privacy Policy.

Information We Collect

2. Information we collect

Personal Information: We may collect personal information that you voluntarily provide to us when you register on the website, request a meeting/consultation, subscribe to our newsletter, respond to a survey, fill out a form, or enter information on our site. This includes your name, email address, phone number, and financial information.

Automatically Collected Information: We may collect information automatically when you visit our website, including your IP address, browser type, operating system, pages visited, and the dates/times of your visits.

3. Use of Information

We use the information we collect for various purposes, including:

- To personalize your experience and deliver content and product offerings relevant to your interests.
- To improve our website and services based on your feedback and usage.
- To process transactions efficiently and accurately.
- To send periodic emails regarding your order or other products and services.
- To follow up with you after correspondence (live chat, email, or phone inquiries).

4. Sharing of Information

We do not sell, trade, or otherwise transfer your personal information to outside parties except as described below:

- **Service Providers:** We may share your information with third-party service providers who perform services on our behalf, such as payment processing, data analysis, email delivery, hosting services, customer service, and marketing assistance.
- **Legal Requirements:** We may disclose your information when required by law or to protect our rights, property, or safety, or that of our users or others.

5. Data Retention

We will retain your personal information only for as long as is necessary for the purposes set out in this Privacy Policy, unless a longer retention period is required or permitted by law. When your information is no longer necessary, we will securely delete or anonymize it.

6. Your Rights:

Depending on your location and applicable laws, you may have the following rights regarding your personal information:

- **Access:** You have the right to request access to the personal information we hold about you.
- **Correction:** You have the right to request that we correct any inaccuracies in your personal information.
- **Deletion:** You have the right to request the deletion of your personal information under certain circumstances.
- **Objection:** You have the right to object to the processing of your personal information.
- **Restriction:** You have the right to request that we restrict the processing of your personal information.
- **Portability:** You have the right to request a copy of your personal information in a structured, commonly used, and machine-readable format.

To exercise any of these rights, please contact us using the contact information provided below.

7. Third-Party Links

Our website may contain links to third-party websites. We do not control these websites and are not responsible for their privacy practices. We encourage you to review the privacy policies of these third-party websites.

8. Changes to This Privacy Policy

We may update this Privacy Policy from time to time. We will notify you of any changes by posting the new Privacy Policy on our website. You are advised to review this Privacy Policy periodically for any changes. Changes to this Privacy Policy are effective when they are posted on this page.

CONTACT US

If you have any questions about this Privacy Policy, please contact us:

Email: info@daanschoeman.co.za

Phone: 015 297 2636