# POPIA NOTICE

How Advisor Office handles personal information

**SWISS FINANCIAL CONSULTING CC**
**trading as ADVISOR OFFICE**

Registration no. 1992/033840/23 | Authorised Financial Services Provider no. 2569

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## About this notice

Advisor Office uses personal information to help people arrange and manage international health insurance, local medical aid and employee benefits. The information we receive often carries a detailed picture of a person, a family or a business. We treat that responsibility with care.

This notice explains what we use, where it comes from, why it helps us provide the service and who may receive it. It applies when you visit our website, submit an enquiry, ask for a quotation or use our services.

> **Our approach:** We keep the information connected to the service, use it for a clear purpose and make sure the people who work with it understand their responsibilities.

## The information we use

The information needed will depend on the service. It can include contact and identity details, employment information, financial details, insurance or medical scheme records, and information about benefits. We also use the notes, forms and correspondence that help us understand your circumstances and keep the service moving.

Health information, claim information and pre-authorisations can be part of the work. Some services involve dependants, beneficiaries or children. These details receive the level of care appropriate to their nature and the service requested.

> **Where it comes from:** We receive most information from you. It may also come from an employer or group representative, a product provider or administrator, a healthcare or assistance provider, or another source connected with the service. Public and official sources are used where the law allows it.

## How information supports your service

Information helps us respond to enquiries, prepare quotations, understand needs, give advice and arrange cover. It supports applications, enrolments, claims, pre-authorisations, ongoing administration and the questions that arise over time.

Some information is required by law, a product provider or a service contract. We will explain this when it applies. A complete record helps our team give suitable advice and assists product providers to deal with the service you have asked for.

## People and organisations involved

Providing a financial service often means working with people and organisations that play a role in the service. Depending on your circumstances, information may go to:

- insurers, medical schemes, administrators, managed-care providers and healthcare providers;
- emergency-assistance providers, claims and pre-authorisation partners;
- an employer or group administrator where the arrangement involves a workplace or member group;
- banks, accountants, legal advisors, compliance partners and service providers supporting our systems and records; and
- regulators or public authorities where a legal or regulatory duty applies.

## When services are international

International cover and assistance can involve people and organisations outside South Africa. Information may be transferred, accessed or stored in another country where the service requires it. The country and provider will depend on the cover and the assistance involved. Advisor Office will take the steps required by POPIA when these arrangements are made.

## Looking after your information

We use organisational, technical and physical safeguards suited to the information in our care. Access controls, confidentiality commitments, secure systems, staff procedures and supplier arrangements help us look after records responsibly.

We keep information for the period needed to provide the service, meet legal retention duties and manage our records. Secure disposal follows when the information reaches the end of that period.

## Cookies on our website

Our website uses cookies and similar tools to help it work properly and make it easier to use. A cookie is a small text file stored on your device. Cookies can help us manage a session, recognise the device being used, route website traffic and understand how people use the site.

Some cookies last only until you close your browser. Others remain on your device until they expire, or you delete them. Your browser settings may allow you to block cookies or require permission before a cookie is stored. Some website functions may work differently if cookies are disabled.

Information collected through cookies is handled in line with this notice and the safeguards described above.

## Your choices

You may ask for access to personal information we hold about you, ask us to correct it, object to certain processing or update a marketing preference. Send the request to management@advisoroffice.com. Our team will tell you what is needed and how we will deal with it.

If you have a concern about the way your information has been handled, please speak to us first. You may also contact the Information Regulator at www.inforegulator.org.za or enquiries@inforegulator.org.za.

## Contact details

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| **Information Officer** | Lisa Jones |
| **Privacy email** | management@advisoroffice.com |
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| **Address** | c/o Regus, 35 Fricker Road, Ethos Building, Ground Floor, Illovo, Sandton, 2196 |
| **Website** | www.advisoroffice.com |

END OF PRIVACY NOTICE