

Security Policy of the Financial Planning Institute of Southern Africa NPC (FPI)

FPI values your right to privacy and security and therefore treat personal information that is obtained through use of our electronic media as private. We also endeavour to provide you with secure access to our online services.

1. Types of information collected

FPI collects personal information about you ('the information') mainly in the following ways:

- On-line user registration
- Applications to become a member
- Requests for services or products
- Contacting us
- Doing business with us.

Other personal information may be collected with:

- CPD and other event subscription or enrolment forms
- Telephonic, Facsimile or Electronic communications

2. Use of information

FPI needs to collect personal or other information to meet obligations to our members, to inform you of new services or developments and to fulfil member instructions, amongst other things.

If you do not provide the required information you may not be able to become a member or you may not be able to receive the information or service you requested.

FPI collects the information to provide you with a specific service, which may include but not be limited to the following:

- Processing your membership application
- Processing your membership recertification
- Sending you information on relevant services, events and the like
- Sending you information on opportunities created for members with other service providers
- Communicating with you on issues relevant to you or transactions with us.

3. Disclosure of information

FPI is governed by the Promotion of Access to Information Act, 2000, as amended.

We will not sell, rent, trade or otherwise supply any personal information obtained from you to third parties without your consent.

We will confirm membership of FPI to members of the public or other professional bodies and provide contact information to overseas member groups if you are going overseas if authorised by you to do so.

We will only provide information as is required to suppliers and business partners to enable a particular service or member benefit to be fulfilled.

4. Information security

FPI has security measures designed to protect against the loss, misuse and/or alteration of the information under its control. These security measures include:

- Firewalls to prevent the hacking of our data base
- Clauses in staff and service provider agreements requiring confidentiality
- Security access to FPI premises
- The use of passwords for access to data base information.

5. Information update

You may gain access to information that FPI has collected about you by contacting us.

You can change or update personal information online or you can also advise us of changes via telephone, e-mail or letter.

6. Contact us

Communication about this security policy may be sent to: standards@fpi.co.za