



# PRIVACY STATEMENT FOR DGC - PETER VAN BEEK AND ASSOCIATES (PTY) LTD

## 1. Introduction

Peter van Beek and Associates ("we," "us," or "our") is committed to protecting the privacy and confidentiality of personal information. As a financial advisory practice specializing in Discovery Bank, Discovery Life, Discovery Invest, Discovery Insure, Discovery Health, and Discovery Gap, we collect, use, and safeguard personal information in compliance with the **Protection of Personal Information Act (POPIA)** and other relevant data protection laws.

## 2. Information We Collect

We collect and process personal information necessary to provide financial advisory and related services. This may include but is not limited to:

- **Personal Details:** Name, ID number, date of birth, and contact details.
- **Financial Information:** Income details, banking details, and investment history.
- **Health Information:** Medical history (where applicable for insurance and healthcare services).
- **Employment Information:** Occupation and employer details.
- **Policy and Account Information:** Insurance policies, investment accounts, and related details.

## 3. How We Use Your Information

Your personal information is collected and processed for the following purposes:

- To provide financial planning and advisory services.
- To facilitate insurance, investment, and banking products with Discovery.
- To assess risk and manage claims where applicable.
- To comply with legal and regulatory requirements.
- To communicate relevant information regarding policies, renewals, or financial updates.
- To improve our services and customer experience.

## 4. How We Share Your Information

We do not sell or distribute personal information to third parties. However, we may share information with:

- **Discovery Group** (including Discovery Bank, Discovery Life, Discovery Invest, Discovery Insure, Discovery Health, and Discovery Gap) to facilitate financial services.
- **Regulatory authorities** where required by law.
- **Third-party service providers** (such as IT support and secure document storage providers) who assist in delivering our services under strict confidentiality agreements.

## 5. Security and Data Protection

We implement appropriate technical and organizational measures to protect personal information against unauthorized access, loss, or disclosure. These include:

- Secure data storage and encryption.
- Restricted access to personal information on a need-to-know basis.
- Compliance with industry security standards.

## 6. Your Rights

Under POPIA, you have the following rights regarding your personal information:

- **Access:** Request access to your personal information.
- **Correction:** Request correction of any inaccurate or outdated information.
- **Deletion:** Request deletion of your data where applicable.
- **Objection:** Object to the processing of your personal information.
- **Lodging a Complaint:** If you believe we have not handled your personal information properly, you may contact us or lodge a complaint with the **Information Regulator of South Africa**.

## 7. Retention of Personal Information

We retain personal information only as long as necessary to fulfil the purposes outlined in this statement and comply with legal and regulatory requirements.

## 8. Contact Information

For any inquiries regarding this Privacy Statement or to exercise your rights, please contact us:

**Peter van Beek and Associates**

12 Rhodes Street

Kensington B

Randburg

2194

Tel: 011 326-3992

[info@pvb.co.za](mailto:info@pvb.co.za)

This Privacy Statement may be updated periodically. Please review it regularly to stay informed about how we handle personal information.

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**By engaging with our services, you acknowledge that you have read and understood this Privacy Statement.**

**Approved by:** Peter van Beek

**Date:** 18 March 2025

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