



PRIVACY POLICY STATEMENT

PRIVACY POLICY

Plan4Ever cc takes your privacy and the protection of your personal information seriously, and will only use your personal information in accordance with this policy and applicable laws. This policy outlines how your personal information will be used by Plan4Ever cc and applies to personal information that you provide us or which we collect from third parties with your permission.

By submitting any personal information to Plan4Ever cc, you provide consent to the processing of your personal information and/or that of your child/children or any child, that you have legal guardianship over (if applicable) as outlined in this policy. Please do not submit any personal information to Plan4Ever cc if you do not agree to any of the provisions of this policy. If you do not consent to the provisions of this policy, or parts thereof, Plan4Ever cc may not be able to provide its services to you.

TYPES OF PERSONAL INFORMATION THAT WE COLLECT

1. We may collect the following personal information about you:

1.1 your name, addresses, contact details, date of birth, place of birth, identity number, passport number, bank details, gender, information about your beneficiary, your employment, tax number, marital status, pregnancy, and your financial information;

1.2 records of correspondence or enquiries from you or anyone acting on your behalf;

1.3 details of your transactions;

1.4 details of contracts you enter into with us and carry out with us;

1.5 details of you made available on third-party sanctions lists; and/or

1.6 special categories of personal information, that includes race, health, and biometric information, such as photos, fingerprints, and/or voiceprints.

HOW WE COLLECT PERSONAL INFORMATION

2. You may provide personal information to us either directly or indirectly (e.g., through a financial advisor or agent acting on your behalf), by completing an application form for our products or services, or when requesting further information about our products or services, whether in writing, through our website, social media platforms, over the phone, or by any other means.

USE OF PERSONAL INFORMATION COLLECTED

3. We may use, transfer and/or disclose your personal information for the purposes of:

3.1 providing you with the information, products and/or services that you have requested, and notifying you about important changes to these products and/or services;

3.2 managing your account or our relationship, and complying with your instructions or requests;

3.3 detecting and preventing fraud, money laundering and/or terrorist financing risk in the interest of security and crime prevention;

3.4 assessing and resolving complaints;

3.5 operational, marketing, auditing, legal and record-keeping requirements;

3.6 verifying your identity; and/or

3.7 verifying the identities of beneficial owners of entities (where relevant).

3.8 We may, from time to time, contact you about products and/or services available from Efficient Wealth and subsidiaries of Efficient Group which we believe may be of interest to you, by email, phone, text messages or other means, unless you have unsubscribed from receiving such communication.

How do we protect your personal information? We make use of reputable service providers to ensure that care is taken to protect your information and also that we can restore the data should there be a technical problem. Client information is kept on our CRM and Accounting tools (Atwork,) as well as on a cloud-based server facilitated by Atwork.

This Privacy Policy Statement applies to all our services, products and any platforms we may use. When we refer to platforms, we refer to websites, ours and contractual providers, mobile sites or apps, i.e. Whatsapp, social media platforms or any other technology or mechanism you may use to interact with us for services and payment of those services.

This Privacy Policy Statement may be reviewed periodically and may change from time to time.

Should you have any comments or queries regarding this Privacy Policy, please do not hesitate to contact our office email: info@plan4ever.co.za or 021 7627590

Life Insurance Disability Income Cover Medical Insurance Retirement Planning Education Planning Bond Cover
Bond Settlement Business Partnership Estate Planning Basic Wills Unit Trusts

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