



REG NO: 2004/012378/07
AUTHORISED FINANCIAL SERVICE PROVIDER
FSP: NO 21782

MEMO

PRIVACY POLICY

Alonza Investments (Pty) Ltd FSP21782

Alonza Investments (Pty) Ltd as a professional Financial Services Provider collects information in order to provide appropriate products and services according to our client's needs.

The accuracy and integrity of the information is dependent on that which we receive and we update the information as changes are advised to us. The accuracy does, however, depend on our clients notifying us of any changes as soon as possible.

Data held by Alonza Investments is accessed only by authorised persons as necessary to provide services. We have implemented security and safeguards to protect the integrity of the data and to prevent unauthorised modification or destruction, bearing in mind that electronic transmission of data has risks which cannot be totally obviated.

Relevant personal information may be provided to third parties who provide services in regard to underwriting, surveys, claims or other allied services in connection with your financial products. These third parties are also bound by the privacy and confidentiality required in terms of the Protection of Personal Information Act as well as the Financial and Intermediary Services Act.

Our clients will be contacted only in regard to requirements or services connected to their financial products, or as consented to in writing, preferably using their selected means of communication

You, as the client, have a right to request access to your information to ensure that the details are correctly maintained. These details are shown on schedules and renewal or annual review documents provided to you.

We do advise clients that the accuracy of the information held is dependent on that which is provided to us.

Changes or corrections of address, contact details, use, ownership, values, or financial interest should be notified to us as soon as reasonably possible.

Records are retained for a minimum of five years after the relationship has ended in compliance with financial legislation or for a longer term as may be prescribed in law. Once the regulated time has elapsed the data will be destroyed according to a controlled process



Should you wish for further information regarding the privacy of your data, or wish to access your records, you may contact the Information Officer at stephenw@alonza.co.za or call us on (012) 361 2211

Date: 10 December 2025

Signed:



S Werner
Director