

Privacy Notice

Keeping your data confidential



Introduction

This Privacy Statement explains how Sanlam collects, uses, and protects your personal data when you use our products and services. It also explains your rights under the UK General Data Protection Regulation (UK GDPR) and related data protection laws.

Who we are

Sanlam is a company committed to protecting and respecting your privacy. This Privacy Notice applies to the Sanlam UK group companies providing your product or service. Details of the relevant company are set out at the end of this document.

What information do we collect?

We collect the personal data you provide, information automatically collected from your use of our website, and data received from third parties. The specific data we collect depends on the service or product you use, and may include:

- Contact details (name, address, phone number, email)
- Identification information (signature, date of birth, nationality, etc.)
- Financial details (bank account information, income, investments)
- Images captured by CCTV
- Recordings of phone calls and electronic communications

We may also collect sensitive personal data, such as health information, with your explicit written consent, although considering the nature of our business this is unlikely.

How do we use your information?

We use your information to:

- Provide and manage your Sanlam product or service
- Comply with legal obligations
- Establish, exercise, or defend our legal rights
- Prevent, investigate, and detect crime
- Respond to and manage inquiries and complaints
- Improve our products and services
- Send reports, valuations, and related communications (not marketing)
- Provide marketing materials (with your consent)

How we collect your Personal Data

We collect your personal data in a number of ways, including:

- When you apply for a product or service
- Through our website and online forms
- Through phone calls and emails
- From third-party sources (with your permission or as permitted by law)

Who do we share your information with?

We may share your information with third-party service providers, other Sanlam group companies, legal and regulatory authorities, and financial advisors (with your authorization). We will only share your data for the purposes described in this Privacy Notice and with the requirement that it is kept confidential.

International data transfers

Sanlam may transfer your data to a limited number of countries outside the European Economic Area (EEA) for specific purposes. We will ensure appropriate safeguards are in place to protect your information.

How long do we keep your information?

We will retain your data for as long as you are a customer and potentially for up to seven years after to handle inquiries or comply with legal requirements.

Your rights

You have the right to:

- Access your personal data
- Request correction of inaccurate data
- Request erasure of your data (in certain circumstances)
- Restrict the processing of your data
- Object to processing of your data
- Request transfer of your data to another party
- Withdraw consent for processing your data

How to contact us

If you have any questions about this Privacy Notice, your rights, or wish to make a complaint, please contact our Data Protection Officer at:

27 Clements Lane, London, EC4N 7AE Email: amcompliance@sanlam.co.uk Phone: 02031 164 000 (Monday-Friday, 9am-5pm)

You can also complain to the Information Commissioner's Office (ICO).

Changes to this Privacy Notice

We may update this Privacy Notice. Please check our website periodically for the latest version.

Sanlam Companies

This Privacy Notice applies to the following Sanlam group companies:

- Sanlam Investments UK Limited
- Sanlam Securities UK Limited
- Sanlam Partnerships Limited