

Cell: +27(0) 64 890 0527

Cell:: +27(0) 82 647 2991

[gerhard@oaktreesa.co.za](mailto:gerhard@oaktreesa.co.za)

[admin@oaktreesa.co.za](mailto:admin@oaktreesa.co.za)

[www.oaktreerisk.co.za](http://www.oaktreerisk.co.za)



Unit 3 Oaklane Office Park, Grippen Road, Bartlett, Boksburg, 1459

An Authorised Financial Service Provider.

FSP NO: 14574

# Oaktree Risk Managers cc Privacy Statement

**1 January 2024**

## Introduction

This statement is directed at our clients, potential clients, or relevant individuals whose personal information we may hold. As a short-term insurance brokerage registered with the Financial Sector Conduct Authority (FSCA), we play a key role in managing our clients' insurance risks within the financial sector.

This privacy statement outlines how we collect, use, and protect your personal information in accordance with South African data protection laws. It is applicable to personal information provided to us by individuals or third parties. We use this information for the purposes described in this privacy statement or as agreed upon at the point of collection.

"Personal Information" encompasses details about identifiable natural and juristic persons. Throughout this privacy statement, we use the term "personal information" to refer to information that identifies individuals, and we collectively term the actions related to it as "processing."

Our processing of personal information serves various purposes, with the type of information collected depending on the specific purpose. We are committed to transparency in our processing activities, aligning with regulatory standards. While complying with the FSCA's requirements, our service offerings often involve determining the purpose and means for processing personal information, exceeding minimum regulatory standards to meet our clients' needs.

## Information We Collect

We collect personal information necessary for providing insurance services, including but not limited to, name, contact details, and relevant financial information.

## How We Use Your Information

Your information is used solely for the purpose of assessing and managing insurance coverage, processing claims, and ensuring effective communication with you.

## **Data Security**

We employ robust security measures to protect your personal information from unauthorized access, disclosure, alteration, and destruction.

## **Third-Party Disclosure**

We do not sell, trade, or otherwise transfer your personal information to third parties without your explicit consent, except as required by law or for insurance-related purposes.

## **Updates to Privacy Policy**

We reserve the right to amend, modify, or supplement this Privacy Statement at any time in accordance with applicable laws and regulations. If changes are made to the Privacy Statement we will provide copies of such changes as requested or required by applicable laws. For information about your individual right of access or this Statement, please send a written request to:

[gerhard@oaktreesa.co.za](mailto:gerhard@oaktreesa.co.za)

## **Our Website**

We may update our privacy policy periodically. Check our website for the latest version

This Privacy Statement explains Oaktree Risk Managers' practices regarding non-public, personal information that is collected by us on this website.

Oaktree Risk Managers cc may obtain information concerning non-public, personal information, such as name, address, date of birth, assets, driver's license number, and general underwriting information concerning risk exposures, policy coverage(s), and premium(s) in order to provide professional services to you.

Oaktree Risk Managers cc may disclose all or part of personal information as permitted by law to non-affiliated third parties solely for purposes of servicing or processing an insurance product or risk management service that is requested or authorized, such as developing risk assessments and solicitation of quotations from insurance carriers. Oaktree Risk Managers cc has policies and procedures in place to limit access to your information to only those who have a business need to view it. You may have an individual right of access to the non-public, personal information that we possess or acquire.

We maintain administrative, technical, and physical safeguards to protect the privacy of non-public, personal information. We will never sell, rent, or share your personal information except to provide professional services to you as described above.

Our website contains links to other sites, and other sites may link to the Oaktree Risk Managers cc site. Websites linking to and from this site may have different privacy practices from the ones described here.

The content of this website was developed in the RSA and is intended for RSA users except where otherwise specified.

**By engaging with Oaktree Risk Managers cc, you consent to the terms outlined in this privacy statement.**

**For any inquiries regarding your privacy, please contact us at 064 890 0527 (Gerhard Byliefeldt)**