



## Privacy Policy: POPIA

Last updated: March 2022

This Privacy Policy describes Capitax's policies and procedures on the collection, use and disclosure of your personal information/data. It follows the guidelines prescribed in the Protection of Personal Information Act, 4 of 2013 ("POPIA") and the recent amendments thereto in July 2021, as well as such set by Capitax's governing body. We use your personal data to enter into an engagement with you in servicing your tax needs. By utilising our services, you agree to the collection and use of information in accordance with this Privacy Policy.

**Personal information** refers to private information about an identifiable living natural person or, where applicable, an identifiable existing juristic person. Personal Information does not include information that does not identify you (including in instances where that information has been de-identified so that it does not identify a person). The personal information that we collect about you may differ on the basis of your engagement with us and will be collected for the purposes of such an engagement.

### The following categories of personal info exists and will likely be shared with CAPITAX:

- **Identity Information**, which includes information concerning your name, username or similar identifier, marital status, title, occupation, interests, date of birth, gender, race and legal status, as well as copies of your identity documents, photographs, identity number, registration number and your qualifications;
- **Contact Information**, which includes your billing addresses, delivery addresses, e-mail addresses and telephone numbers;
- **Financial Information**, which includes bank account details; details of funds which we invest and hold on your behalf for a matter, insurance information, financial statements, tax clearance certificates and VAT registration numbers;
- **Transaction Information**, which includes details about payments made to or received from you and company information, which may consist of financial activity;
- **Technical Information**, which includes your internet protocol (IP) address, your login data, browser type and version, time zone setting and location, browser plug-in types and versions, operating system and platform, and other technology on the devices you use to access the Website or to use our products and services or engage with us;
- **Usage Information**, which includes information as to your access to and use of our online platform/website;
- **Location Information**, which includes your geographical information
- **Marketing and Communications Information**, which includes your preferences in respect of receiving marketing information from us and our third parties, and your communication preferences.

**You agree and give permission for us to share your personal information under the following circumstances:**

- with CapitaX employees, suppliers, consultants, contractors, affiliates and/or if and to the extent that they require your personal data in the provision of services for or to us, which include know-how and research, pitching to other clients to obtain further instructions; reporting purposes (e.g. the South African Revenue Service); hosting, development and administration, technical support and other support services.
- to enable us to enforce or apply our Terms and/or any Agreement you have with us;
- to enable us to monitor web traffic: web servers serving the website automatically collect information about pages you visit. This information is used for internal review, to tailor information to individual visitors and for traffic audits;
- to protect our rights, property or safety or that of our clients, employees, contractors, suppliers, agents and any other third party;
- we may share or transfer your personal information in connection with, or during negotiations of, any merger, sale of company assets, financing, or acquisition of all or a portion of our business to another company
- with governmental agencies and other regulatory or self-regulatory bodies in good faith, if required to do so by law or when we reasonably believe that such action is necessary to comply with the law or with any legal process;
- we may disclose your personal information for any other purpose with your consent.

In short, we will not intentionally disclose your personal Information, whether for commercial gain or otherwise, other than with your permission, as permitted by applicable law or in the manner as set out in this Privacy Policy.

**Storage, transfer and retention of your Personal Data**

We store your Personal Information:

- at our premises, in the form of hard copies;
- at the premises of third party service providers such as document storage service providers;
- our servers; and / or
- on the servers of our third party service providers, such as IT systems or hosting service providers.

We will retain your personal data for a period of five years, in accordance with our legal obligations as registered tax practitioners.

Your information is processed at the CapitaX's operating offices and in any other places where the parties involved in the processing are located. It means that this information may be transferred to — and maintained on — computers located outside of your country of work/residence, where the data protection laws may differ than those from your jurisdiction.

Your consent to this Privacy Policy by way of your submission of such information represents your agreement to that transfer.

CapitaX will take all steps reasonably necessary to ensure that your data is treated securely: received, stored and transferred. No transfer of your personal info will take place to an organisation or a country unless there are adequate controls in place safeguarding your personal information.

**Security of your Personal Data**

The security of your personal info is important to us, but it is important to note that that no method of transmission over the Internet, or method of electronic storage is 100% secure. While we strive to use commercially acceptable means to protect your personal info, we cannot guarantee its absolute security.

## **Website, Electronic Mail and WhatsApp disclaimers**

The content of our electronic communications often serves as a means to transfer data. Reasonable care shall be taken to ensure the transfer of communicate and personal info reaches you; the intended user/receiver. The content of these communications does not constitute as being formal, legal or professional advice whatsoever.

Similarly, the materials published on this website are provided for general information purposes only and do not constitute legal or other professional advice. While every effort is made to update the information regularly and to offer the most current, correct and accurate information, we accept no liability or responsibility whatsoever if any information is, for whatever reason, incorrect, inaccurate or dated.

Due diligence shall be taken when communication is initiated to you by Capitax, to obtain your consent, indirect be it may; the receiver thereof.

We accept no responsibility for any loss or damage, whether direct, indirect, or consequential, which may arise from access to or reliance on the information contained in these pages. We have taken reasonable measures to ensure the integrity of this website, however no warranty is given that any files, downloads, or applications available via this website are free of viruses which may corrupt your system.

Furthermore, our site contains links to other websites that are not operated by us. If you click on a third party link, you will be directed to that third party's site. We therefore strongly advise that you to review the Privacy Policy of every site you visit.

We have no control over and assume no responsibility for the content, privacy policies or practices of any third party sites or services.

Happy browsing!

## **Changes to this Privacy Policy**

We may update Our Privacy Policy from time to time. We will notify you of any changes by posting the new Privacy Policy on this page. You are therefore advised to review this Privacy Policy periodically for any changes. Changes to this Privacy Policy are effective when they are posted on this page.

## **Contact Us**

If you have any questions about this Privacy Policy, you can contact us by email: [admin@capitax.co.za](mailto:admin@capitax.co.za)