

# ***Tax Perks Bookkeeping***

*PO BOX 35090 NEWTON PARK 6055 / 34B CURRIE CRESCENT, WESTERING, PORT ELIZABETH 6025*

*TEL : 041 - 360 7601 FAX: 041 - 3608113 / OFFICE EMAIL: [taxperks@aerosat.co.za](mailto:taxperks@aerosat.co.za) / [taxperks34@gmail.com](mailto:taxperks34@gmail.com)*

*CK 2003-107183-23 / TAX PERKS 106 CC ta TAX PERKS BOOKKEEPING / VAT NO : 4790212551*

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## **PRIVACY POLICY**

**Tax Perks Bookkeeping is committed to respecting your privacy and is committed to protecting your personal data as required in terms of the Protection of Personal Information Act 4 of 2013.**

**This policy, together with our Terms and Conditions, sets out the privacy practices for our firm.**

Please read this statement carefully to understand why data is being collected and what we do with that data because by accessing our services, browsing or otherwise using our website, you confirm that you have read, understood and agree to the terms of this Privacy Policy, and you consent to the collection and use of your data in accordance with this statement, unless we are notified in writing to the contrary by you.

Our website and services may contain links to other independent websites. These sites may ask you to provide information to them. Please be aware that such requests and information provided is not under our control, and we are not responsible for the privacy practices of those other sites. We encourage you to be aware when you leave our website to read the privacy statement of each and every website that you may enter.

We may change this policy from time to time by updating this page. You should check this page from time to time to ensure you are happy with any changes.

### **INFORMATION COLLECTED AND USED**

#### **1. What type of information do we collect from you?**

When you access our website or engage our services, Tax Perks Bookkeeping or any other third parties who hosts, maintains or supports our services, may collect personal and technical information about you.

The personal information we collect from you will typically include the following:

- Full name and contact details (including your date of birth, contact number, email, postal and street address).

- Any phone number or email used to get in touch with us.
- Information relating to your identity, residential address, marital status, information about your family members, close associates, and source of funds for a transaction where we are required by law to collect this to comply with the Financial Intelligence Centre Act 2001 and/or other prescriptive legislation.
- Your banking details.

### **Technical information**

The technical information collected is anonymous and will include the usage information about visits to our website (via 'cookies' which enables our website to remember information about you and your preferences). The technical information collected includes:

- Internet Protocol (IP) address used to connect your device to the Internet
- URL click stream to and from our site (including date and time)
- Device operating system and platform
- Device location data (if function is not disabled on your device)
- Browser and plugin types and versions
- Time zone settings
- Pages and/or products viewed and/or searched for
- Time spent on certain page and page interaction information (such as scrolling, clicks and mouse-overs)
- Methods used to land and exit from the website and/or page
- Page response times
- Download errors

Communication history between you and our firm, including a record of the email, telephone and postal correspondence created (i) when you contact us as part of a product or service query; (ii) during the contractual period of the delivery of services.

Where we need to collect personal data by law (for example, to meet our obligations to prevent fraud and money laundering) or under the terms of a contract we have with you, and you fail to provide that data when requested, we may not be able to (i) perform the existing mandate and/or services as requested, (ii) enter in a mandate and/or services as requested. In this case, we may have to cancel a mandate or service you have with us, but we will notify you if this is the case at the time.

## 2. **On what basis can we process your information?**

We will only process your information in pursuance of our legitimate mandate to deliver our services to you.

The legal grounds under data protection legislation for processing your personal data are contained in the Protection of Personal Information Act 4 of 2013 and are as follows:

- It is necessary for the performance of a mandate to which you are a party, or to take steps prior to entering into a mandate with you, for us to provide you with our services;
- You have given us consent to the processing of your personal data for one or more specific purposes, namely (i) where you have given us consent to receive electronic marketing by us and/or (ii) to process your Special Personal Information. You do not need to provide us with marketing consent in order to receive our services;
- It is necessary for the purposes of our legitimate interests, except where our interests are surpassed by the interests, rights or freedoms of affected individuals (such as you). To determine this, we shall consider a number of factors, such as what you were told at the time you provided your data, what your expectations are about the processing of the data, the nature of the data, and the impact of the processing on you. Our legitimate interests include processing necessary to improve and to promote our services and product and to better understand our clients' interests and to administer the technical aspects of our service and products;
- Where we need to comply with a legal obligation;

- Where we need to protect your interests (or someone else's interests); and/or
- Where it is needed in the public interest or for official purposes.

3. **What are we going to do with your information?**

We will hold and use personal information about you in the following ways:

- To fulfil our obligations to you when providing you with our services;
- To share your information with others where necessary to fulfil our services to you;
- To comply with our statutory and regulatory obligations, including verifying your identity, prevention of fraud and money laundering and to assess your credit worthiness, as may be necessary;
- Communicate with you during the course of providing our services, for example with your enquiries and requests and keeping you updated with the progress of your matter;
- Statistical purposes so we can analyse figures to help us manage our business and to plan strategically for the future;
- Track your use of our service, including your navigation of our website in order to improve the website performance and user experience;
- To ensure that content from our website is presented in the most effective manner for you and for your device;
- To notify you about changes to our service.

4. **How long do we keep your data for?**

We will retain your personal data for different periods depending on the service you have chosen to use us for and/or where we are under regulatory or statutory duties to hold your data for a longer period or need to retain it in the event of a legal claim or complaint.

5. **Who do we share your information with?**

We may pass your details on to persons who carry out certain activities on our behalf as part of us providing our services, in terms of your instruction to us, or other professionals associated with or involved in your matter: payment service providers, property professionals, credit reference agencies, cloud computing host providers, technical support service providers, advertising networks services, email marketing services, financial services, business partners, sub-contractors, other firms, other parties to your transaction, etc.

We will also disclose certain personal information to third parties:

- If our firm or substantially all of our assets are acquired by a third party, in which case personal data held by us about our clients will be one of the transferred assets.
- If we are under a duty to disclose or share your personal data in order to comply with any legal or regulatory obligation, or to protect the rights, property, or safety of our firm, our clients, or others. This includes exchanging information with other companies and organisations for the purposes of fraud protection.
- We will not share your information with third parties for marketing purposes without first obtaining your prior consent.

## **SECURITY**

### **6. Is your data secure?**

We are committed to ensuring that your information is secure. Your data is held on secure servers with necessary technological and operation measures put in place to safeguard it from unauthorised access, as far as can reasonably be required for purposes of transacting with us. Where possible any identifiable information will be encrypted or minimised.

### **7. Usernames and passwords**

If we should ever in the future give you a username and password to enable you to access certain parts of your data on our systems, you will be responsible for keeping it confidential and not sharing it.

### **8. Unauthorised access to personal data**

The data that we collect from you may be stored and processed by staff who work for us or one of our service providers. Such staff may be engaged in the fulfilment of the contract and/or services to you. We have taken all the necessary steps to ensure that your data is treated by them securely and in accordance with this policy.

## **YOUR RIGHTS**

### **9. How to access and update your information?**

You have a right to request a copy of the personal information we hold about you. You also have the right to request that information we hold about you which may be incorrect, or which has been changed since you first told us, to be updated or removed. These requests should be directed to the director or staff member providing your service.

### **10. How to request deletion of your data**

You can ask us to delete or remove personal data where there is no good reason for us continuing to process it. You also have the right to ask us to delete or remove your personal data where you have successfully exercised your right to object to processing, where you have withdrawn consent for us to process it, where we may have processed your information unlawfully or where we are required to erase your personal data to comply with the law.

Note that we may not always be able to comply with your request to delete if specific legal responsibilities or requirements prohibits us from doing so. This will be communicated to you at the time of your request, if applicable.

### **11. How to withdraw your consent**

You have the right at any time to withdraw any consent you have given us to process your personal information. Please note if you withdraw your consent it will not affect the lawfulness of any processing of your personal data we have carried out before you withdrew your consent. Should you wish to do so you can change your consent preferences at any time by contacting the director or staff member providing your service.

### **12. How to restrict or object us using your data?**

You may ask us to suspend the way in which we are using your information, or object to our processing your data where we are relying on a legitimate interest ground (or those of a third party) and you feel it impacts on your fundamental right to privacy. In some cases where you object, we may demonstrate that we have compelling legitimate grounds to process your information which override your rights and freedoms.

Please note that if you want us to restrict or stop processing your data this may impact on our ability to provide our services to you. Depending on the extent of your request we may be unable to continue providing you with our service.

**13. Moving your information to another organisation**

In the event that we process your data by automated means where you have either provided us with consent for us to use your information or where we used the information to perform a contract with you, you have the right to request that we send to you or to another organisation, a copy of the personal data we hold about you, for example, when you are dealing with a different service provider. If you would like us to move, copy, or transfer your information please inform the director or staff member providing your service.

**14. Complaints about the use of your personal data**

If you wish to raise a complaint on how we have handled your personal data, you can contact the staff member who provided your service or our Compliance Officer Tracey Williams at [tracey@taxperks.co.za](mailto:tracey@taxperks.co.za).

If you are not satisfied with our response or believe we are not processing your personal data in accordance with the law, you can complain to the Information Regulator on: Tel +27 (0) 10 023 5207; or on [infoereg@justice.gov.za](mailto:infoereg@justice.gov.za).