



**FINANCIAL
PLANNING
SUMMIT**

REFRAMING

**the future of financial
advice and wealth management**

REFRAMING

The Collaborative Exchange (Pty) Ltd - Privacy Policy

This privacy policy provides details of the personal information we collect, what we do with it, how you can get access to it and who we share it with.

1. Who we are:

The Collaborative Exchange (Pty) Ltd

Registration Number: 2018/437972/07

Post Address: P.O. Box 312 Plettenberg Bay 6600, South Africa

Office Tel: +27 87 898 5490

Email: info@thecollaborative.co.za

Director: K Hinton / Tel: +27 82 568 1795

Company website: <http://www.thecollaborative.co.za> and event website: www.financialplanning-summit.co.za

2. What is “Personal Information”

“Personal Information” means any information which is related to an identified or identifiable person, directly or indirectly, in particular by reference to an ‘identifier’ such as name, surname, contact information dietary requirements, personal health information and so on.

3. What Personal Information do we collect?

The personal information we collect depends on the purpose we are collecting it for.

Your name, surname and email address will only be provided to the sponsors of each of the individual sessions if you attend the session and may only be used by our sponsors for viewed for post event follow-up contact purposes. You can opt-out of providing this information to our sponsors by contacting us at info@thecollaborative.co.za.

This is the personal information we collect is:

- a. Attendee account – (virtual event platform – optional if activated linked to log in only)
 - i. For attendee account, we collect Facebook and LinkedIn social logins which include your e-mail address, ID number, first name, surname and profile data of Facebook and/or LinkedIn.
- b. Registration and Ticketing – (event registration website and/or virtual event platform)
 - i. If you are attending an event or to buy tickets for that event you will need to register with us. We will ask for your personal information including name, surname, e-mail address, ID number, contact number/s and so on as determined by the Event Organiser. All these

information fields are customizable by the Event Organiser and they are responsible for protecting your personal information.

- ii. If you wish to opt out of the registration and ticketing process or stop receiving any emails from the organiser after the event is over, you can decline a personal invitation or unsubscribe completely to their services.
- iii. In case of any doubt or query, feel free to contact us or drop an email at (info@thecollaborative.co.za) to assist you.
- iv. While registering and buying tickets of an event, you will be asked to provide either your personal or Company invoicing details including VAT number and you might be asked to enter the transaction and financial information (credit card details, debit card details etc), used with the services of the third-party organisation i.e. DPO PayGate, PayFast, Stripe and Razorpay. All these third-parties applications are responsible for any financial information being collected from you and not us nor the Event Organisers.
- v. We DO NOT store your payment related, financial or transactional details.

c. Event Website – (event registration website and/or virtual event platform)

- i. The event website may contain “Contact Us” section added by the event organiser. The personal information collected may include name, e-mail address, ID number, phone number, designation and so on which are totally customizable by the event organiser.
- ii. The event websites also have an option for you to opt-in for subscriptions such as newsletters from the event organiser through the ‘Subscribe’ box. By opting in for the services, your e-mail address will be used to send you e-mails from the event organiser.
- iii. Some event websites may also include an embedded registration form where your personal information can be requested like name, Surname, e-mail address, ID number, contact number/s etc. All these fields are customizable by the event organiser.

d. Networking Community – (virtual event platform)

- i. While logging into the networking community, you may have the option to log in through Facebook and LinkedIn social profiles but only your email ID and names will be taken. We use cookies in Event Networking Community. To know more refer to our Cookie Policy.
- ii. The networking community platform also has a messaging feature, newsfeed and view profiles for which your personal information is used. You may create a new post, share content on the newsfeed which can include text, images and videos on our Networking Community Platform.

e. Event App – (if applicable)

- i. The app may require a login which may also be linked from social profiles such as Facebook and LinkedIn. While installing an app, certain permissions are required such as access to media files, storage, contacts etc. In case you wish to not provide access, select the option “no”.

f. Analytics – (if applicable)

- i. We sometimes use third-party analytics provider called Google Analytics to collect general information about the usage of our applications and to help improve the applications. The information helps us make the application better and your experience of it easier.

- ii. Google Analytics uses cookies and various other technologies to collect information about the usage of the applications and also reports website trends, without storing any personal data.

4. How do we use your Personal Information?

The Personal Information collected from <https://www.thecollaborative.co.za> and <https://www.financialplanning-summit.co.za> is used for the following purposes:

Event / Event Organisers / Event Session Sponsors may use your Personal Information:

- (i) To send newsletters to you,
- (ii) For marketing and promotional purposes for current and future events, and
- (iii) In response to “Contact Us” or any request initiated by you.

The Personal Information collected from the various event website/s and event applications provided by the Event can be used by the Event Organiser and the Collaborative Exchange (Pty) Ltd. The data collected by the event organisers may be used for advertisements or promotional purposes by itself or its authorised event sponsors.

5. This Privacy Notice forms part of our Terms and Conditions

The Privacy Policy is developed as a part of the End User Terms of Service which can be viewed on the website and within the Services which we provide. The Terms of Use must be accepted prior to using the service for the first time.

6. Opting Out

Existing users and subscribers have been provided with an option to opt out from our services-related emails, newsletters that are used for marketing purposes. Every email has an ‘unsubscribe’ link.

You can choose not to receive such emails by declining a personal invitation or unsubscribing and opt-out of our services. If you do this then we will delete your contact details from our servers. Please note that for any queries, or in case you want to opt-in to use our services again, you may contact us on info@thecollaborative.co.za.

In case you want to opt-out of any event related services, you can send us an email at info@thecollaborative.co.za.

7. Our subcontractors (Operators)

We provide your personal information to various IT related companies such as our registration site developer - Pi-Squared (South Africa) and the Virtual event platform developer (India). We have agreements in place with them where they agree (amongst other things) to only use your personal information for the purpose for which it was provided, to keep it safe and secure, to keep it confidential and to tell us if there has been any security incident. If you want to know more about this please contact us at info@thecollaborative.co.za.

8. Special Personal Information and Children’s Personal Information

We don’t knowingly collect either special personal information (like criminal records) or children’s personal information (personal information about people under the age of 18 years). Please let us know if you are aware of any information that we have that is considered Special Personal Information or Children’s information so we can deal with it appropriately (which probably means we will delete it).

9. Security

The safety of your personal information is very important to us, but it is equally important that you safeguard it too. We use reasonably security measures to protect your Personal Information and we will let you know if we have any reason to suspect that your personal information has been compromised.

We would appreciate it if you warn us of any security breach you may have suffered and in particular if any of your login details have become known by a third party (i.e. someone other than you) so that we can take appropriate steps.

10. Cookies

Our website/s sometimes use “cookies” which is a small text file that is mostly used to collect information. In our case, we use cookies to act as tokens to authorize users for iframe compatibility. If you want to disable cookies, it is possible to do that in your browser settings. Most browsers allow you to control cookies, including whether or not to accept them and how to remove them.

11. Ownership of Personal Information

While we own our database of personal information, you have several rights over that Personal Information which affects whether we can hold it, how we use it and when we delete it.

12. How you access your information

If you, at any point in time would like to delete or correct any of your Personal Information that we have about you, you can request access to the data by emailing us at info@thecollaborative.co.za. Please be clear about the information you wish to have. We may refuse to give you this personal information unless we have confirmed your identity or if we have a valid reason in terms of the Promotion of Access to Information Act.

13. The SA Information Regulator

You have the right to lodge a complaint with the SA Information Regulator. See the Information Regulator contact details below.

The Information Regulator (South Africa)
33 Hoofd Street
Forum III, 3rd Floor Braampark
South Africa
infoereg@justice.gov.za