



BESPOKE EXECUTOR SERVICES
Customised Fiduciary Solutions

BEXs NOTICE & CLIENT POPIA* CONSENT FORM

* Protection of Personal Information Act, 2013

Bespoke Executor Services (BEXs) understands that your personal information is important to you so to whom and how you share this information is sacrosanct. With this in mind BEXs unreservedly respects your privacy. Accordingly, any personal information we collect from you will be minimal and used or stored in a lawful manner and used only for the purposes of providing you with Fiduciary Services.

BEXs neither sells, trades or shares our clients personal information and we do not under any circumstances buy or receive client information other than from yourself or your duly appointed representative.

The aim of this document is to ensure : -

- That you know why we need to receive and process some of your personal information
- That you know why we store some of your personal information

Why we need your information

As you know we are a provider of a wide range of Fiduciary Services and in order to render these services, such as your Last Will and Restatement we need your personal information

Wholistic Estate Planning encompasses BEXs giving you advice on taxes and expenses your estate will be faced with on your death and moreover, we want to ensure that there is no cash shortfall in your estate which could lead to 1) delays in the administration of the estate, and 2) avoid having to force see assets

To remind you to review your Will/Trust periodically and ensure that your fiduciary intentions are relevant and to share with you important legislation and tax changes that impact on your fiduciary intentions

Some of the information we need (not a comprehensive list)

- Full names
- Address
- Email address
- Marital Status
- Divorce obligations
- Children names
- Identity numbers of testator/testatrix/beneficiaries
- Assets and Liabilities

At no stage do we ask for or store banking information

How we process your personal information

- We receive your information by email from you or your financial planner
- We receive your information directly from you or your financial planner
- All e-mails from BEXs containing sensitive information are password protected
- All the information provided by us is stored electronically on Microsoft SharePoint which is cloud based
- We try not to save any personal information on a local drive
- All personal information is backed up and this back up is cloud based

You are legally entitled, in terms of the Promotion of Access to information Act (PAIA) to at any stage request access or to change any information that we hold about you. Follow this link to do so

<https://bexs.co.za/sites/default/files/Request%20for%20Information%20under%20PAIA%20form-1.pdf>

Details of our Information Officer

- Name: Elna van der Walt
- Email address: elnav@bexs.co.za
- Mobile: 0833076317



Consent to Store your information

I hereby authorise and consent to the organisation sharing my personal information with the following persons:

Full Names	
Identity number	
Email address	
Cellphone number	

Signed at _____ on this _____ day of _____
