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1. *Privacy Statement*
2. *Legal Disclaimer*
3. *Access to Information Manual*

PRIVACY STATEMENT

This privacy statement was last updated on 12 December 2023

Introduction

Philip Miller & Co. is strongly committed to protecting personal data. This privacy statement describes why and how we collect and use personal data and provides information about individuals' rights in relation to personal data. It applies to personal data provided to us, both by individuals themselves or by others. We may use personal data provided to us for any of the purposes described in this privacy statement or as otherwise stated at the point of collection.

As used in this privacy statement, "us", and "we" refers to Philip Miller & Co., the firm that may process your personal information.

In this privacy statement, we refer to information about you or information that identifies you as "personal data" or "personal information". We also sometimes collectively refer to handling, collecting, protecting or storing your personal information as "processing" such personal information.

Philip Miller & Co. processes personal data for numerous purposes. Our policy is to be transparent about why and how we process personal data.

Our legal grounds for processing your personal data

We rely on one or more of the following processing conditions:

- our legitimate interests in the effective delivery of information and services to you and in the effective and lawful operation of our businesses and the legitimate interests of our clients in receiving professional services from us as part of running their organisation (provided these do not interfere with your rights);
- our legitimate interests in developing and improving our businesses, services and offerings and in developing new technologies and offerings (provided these do not interfere with your rights);
- to satisfy any requirement of law, regulation or professional body of which we are a member (for example, for some of our services, we have a legal obligation to provide the service in a certain way);

- to perform our obligations under a contractual arrangement with you; or
- where no other processing condition is available, if you have agreed to us processing your personal information for the relevant purpose.

Other Associated Firms

We may share personal data with other associated firms where necessary in connection with the purposes described in this privacy statement. For example, when providing professional services to a client we may share personal information with the associated firms that are involved in providing advice to that client.

Third Party Providers

We may transfer or disclose the personal data we collect to third party contractors, subcontractors, and/or their subsidiaries and affiliates. Third parties support the Philip Miller & Co. network in providing its services and help provide, run and manage IT systems. Examples of third-party contractors we use are providers of identity management, website hosting and management, data analysis, data backup, security and cloud storage services. The servers powering and facilitating our IT infrastructure are located in premises other than our physical location, and personal data may be stored in any one of them.

The third-party providers may use their own third-party subcontractors that have access to personal data (sub-processors). It is our policy to use only third-party providers that are bound to maintain appropriate levels of security and confidentiality, to process personal information only as instructed by Philip Miller & Co., and to flow those same obligations down to their sub-processors.

Other disclosures

We may also disclose personal information under the following circumstances:

- with professional advisers, for example, law firms, as necessary to establish, exercise or defend our legal rights and obtain advice in connection with the running of our business. Personal data may be shared with these advisers as necessary in connection with the services they have been engaged to provide;
- when explicitly requested by you;
- when required to deliver publications or reference materials requested by you;
- when required to facilitate conferences or events hosted by a third party;
- to law enforcement, regulatory and other government agencies and to professional bodies, as required by and/or in accordance with applicable law or regulation. Philip Miller & Co. may also review and use your personal information to determine whether disclosure is required or permitted.

Security

We have implemented general standards of security in order to protect personal information from loss, misuse, alteration or destruction. Only authorised persons are provided access to personal information; such individuals have agreed to maintain the confidentiality of this information.

Although we use appropriate security measures once we have received your personal data, the transmission of data over the internet (including by e-mail) is never completely secure. We endeavour to protect personal data, but we cannot guarantee the security of data transmitted to or by us.

Your legal rights in relation to personal data

You may have certain rights under your local law in relation to the personal information we hold about you. In particular, you may have a legal right to:

- Obtain confirmation as to whether we process personal data about you, receive a copy of your personal data and obtain certain other information about how and why we process your personal data
- The right to request for your personal data to be amended or rectified where it is inaccurate (for example, if you change your address) and to have incomplete personal data completed
- The right to delete your personal data in the following cases:
 - the personal data is no longer necessary in relation to the purposes for which they were collected and processed;
 - our legal ground for processing is consent, you withdraw consent and we have no other lawful basis for the processing;
 - our legal ground for processing is that the processing is necessary for legitimate interests pursued by us or a third party, you object to the processing and we do not have overriding legitimate grounds;
 - you object to processing for direct marketing purposes;
 - your personal data has been unlawfully processed; or
 - your personal data must be erased to comply with a legal obligation to which we are subject.
- The right to restrict personal data processing in the following cases:
 - for a period enabling us to verify the accuracy of personal data where you contested the accuracy of the personal data;
 - your personal data have been unlawfully processed and you request restriction of processing instead of deletion;
 - your personal data are no longer necessary in relation to the purposes for which they were collected and processed but the personal data is required by you to establish, exercise or defend legal claims; or
 - for a period enabling us to verify whether the legitimate grounds relied on by us override your interests where you have objected to processing based on it being necessary for the pursuit of a legitimate interest identified by us.
- The right to object to the processing of your personal data in the following cases:
 - our legal ground for processing is that the processing is necessary for a legitimate interest pursued by us or a third party; or
 - our processing is for direct marketing purposes.

- The right to data portability
 - The right to receive your personal data provided by you to us and the right to send the data to another organisation (or ask us to do so if technically feasible) where our lawful basis for processing the personal data is consent or necessity for the performance of our contract with you and the processing is carried out by automated means.
- The right to withdraw consent
 - Where we process personal data based on consent, individuals have a right to withdraw consent at any time. We do not generally process personal data based on consent (as we can usually rely on another legal basis).

Changes to this privacy statement

This privacy statement was last updated on **12 December 2023**.

We may update this privacy statement at any time by publishing an updated version here. So that you know when we make changes to this privacy statement, we will amend the revision date at the top of this page. The new modified or amended privacy statement will apply from that revision date. Therefore, we encourage you to review this privacy statement periodically to be informed about how we are protecting your information.

Contact us

Let us know if you would like to unsubscribe from Philip Miller & Co. e-mail correspondence / marketing by sending an e-mail to info@pmiller.co.za.

Please submit a request to info@pmiller.co.za to exercise a legal right in relation to your personal data, or an enquiry if you have a question or complaint about the handling of your personal data.

For anything else, please use our [general contact form](#).

You may also contact us at the following postal address:

Philip Miller & Co.

PO Box 40

Potchefstroom

South Africa

2520

LEGAL DISCLAIMER

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ACCESS TO INFORMATION MANUAL

On 9 March 2001, the Promotion of Access to Information Act, No. 2 of 2000 (“the Act”) became operative, giving effect to the section 32(2) Constitutional right of access to information.

One of the main requirements specified in the Act, is the compilation of an information manual that provides information on both the types and categories of records held by a private body.

This document serves as the Philip Miller & Co. information manual and provides reference to the records held by Philip Miller & Co. and the process to request access to such records.

A copy of the manual is available to the public for inspection at the Human Rights Commission (“HRC”) and the Philip Miller & Co. office in Potchefstroom.