SUPPORTING NOTE & FAQ: MEMBER PRIVACY POLICY

Published 14 November 2024

Classification

This document is classified as a supporting note. It is not intended to prescribe requirements or replace or contradict the Member Privacy Policy available on the ASSA website. It serves to provide additional information and examples to help members to understand the Member Privacy Policy and how ASSA intends to use some of the personal information as outlined in the policy.

This note relates only to the ASSA Member Privacy Policy as published in November 2024. The information note may be updated periodically.

Overview

The Protection of Personal Information Act, no 4 of 2013 ("**POPIA**") applies to both private and public bodies regulating how personal information may be processed and providing rights and remedies to protect personal information. The ASSA Member Privacy Policy outlines how ASSA intends to use members' personal information.

The updated Member Privacy Policy is available on the ASSA website and can be accessed and downloaded as part of Renewal cycle 2024 for 2025.

The amended policy is effective as of 01 January 2025.

Key focus of the last review

ASSA Member Privacy Policy is reviewed and amended periodically, with the latest amendment in November 2024. Key objectives include:

- **Compliance with POPIA**: Ensuring ASSA adheres to legal requirements, including providing members with a clear privacy policy.
- **Commitment to data privacy**: Informing members how their data is collected, used, and safeguarded.
- **Service delivery**: Using member data responsibly to improve services and member support.

The policy's fundamental principles remain consistent with the previous version, though some sections have been updated.

Acceptance of the privacy policy remains a requirement for membership, and ASSA remains committed to balancing legitimate business needs with members' reasonable privacy expectations.

ASSA will continue implementing appropriate technical and organisational safeguards to prevent unauthorised access of personal information, sharing it externally only when a legitimate purpose exists.

Updates in this version include:

- **Focus on members**: The policy is now more focused on members, with a separate data policy for external parties and service providers.
- **Clarified sharing with external stakeholders**: ASSA, using experience gained over the past few years, is able to specify in more detail some external stakeholders and the reasons for sharing information with them.
- **Enhanced professional development**: ASSA is more specific on some areas of data collection and use that will allow an improvement in gathering and sharing statistics and in improving its services to members.
- **Members rights:** expanded on members' rights regarding data deletion and processing restrictions

Frequently asked questions to aid in understanding of the policy:

Can I withdraw consent for ASSA to obtain, process, or share my personal information?

According to clause 13, members may request to withdraw consent or delete information. ASSA will assess each request individually, considering the impact on delivering member services and legitimate organisational needs.

Requests should be made via email addressed to information_officer@actuarialsociety.org.za with detailed reasoning and/or motivation.

Please be aware that certain information cannot be deleted or omitted, as doing so could impact ASSA's ability to fulfill its obligations, or affect other functioning, such as statistical information and analysis.

Please provide examples to illustrate why special personal information is collected and how it is processed.

An example is where health information is required to process special concessions applications. Another is where personal information is used to cater for individuals with special needs or dietary preferences at events.

Why and how does ASSA use my information for marketing?

ASSA may use your data to ensure relevant and targeted communication, reducing irrelevant messaging. Marketing areas may include an invitation to participate in or make use of training, CPD related events, general ASSA events, publications and ASSA education products like targeted course notifications. As an example, ASSA may send targeted information to students who qualify for a specific course or NS module. ASSA does not sell information to external marketing organisations.

Will ASSA share personal information to the public or other third parties when they request it?

ASSA limits information sharing to cases with legitimate reasons for doing so only. ASSA will usually aim to inform the member before any disclosure and will typically contact the member to obtain permission.

Member verification will be available on the ASSA website to manage the risk of misrepresentation of the profession to the benefit of all members. The person requesting the verification of a member must already be in possession of the member's surname and date of birth. The member verification will then provide name, surname and if the member is a

qualified actuary and/or holder of a practicing certificate. No contact details will be shared.

Can ASSA exchange personal information with international organisations under MRAs?

Yes, ASSA may share and obtain information relevant to membership status, disciplinary actions and sanctions with international partners to protect the profession's reputation and fulfill MRA obligations.

Why is the Regulator included as a party that ASSA may share information with?

ASSA may disclose information to a regulator when required for compliance or professional responsibilities.

How will ASSA prevent unauthorised access to personal information?

ASSA routinely reviews its security practices from both a technological and procedural perspective, implementing best practice where appropriate. As an example, the next round of technical vulnerability testing is scheduled for 2025. If ASSA finds or believes that personal information has been accessed or acquired by unauthorised parties, it will notify the affected members and the Information Regulator, as required under POPIA.

Members are welcome to send any suggestions or questions, to information_officer@actuarialsociety.org.za. These may be considered in future policy updates.