

FUNDS PROTECT PERSONAL POLICY APPLICATION FORM

Please complete the below application form and submit it to investecsales@aon.co.za

POLICY HOLDER DETAILS

Name Surname

ID Number Email Address

Physical Address

Cellphone Number Landline Number

BROKERAGE DETAILS

Aon South Africa (Pty) Ltd is an Authorised Financial Services Provider, FSP #20555

Brokerage Name

Email Address investecsales@aon.co.za Contact Number 0860 746 466

COVER LIMIT AND PREMIUM

Select one option

R 25 000 @
R 20.00 p/m

R 50 000 @
R 33.00 p/m

R 100 000 @
R 48.00 p/m

R 250 000 @
R 123.00 p/m

R 500 000 @
R 220.00 p/m

R 1 000 000 @
R 385.00 p/m

Inception Date / /20

NOTE: Premiums are payable in advance. Banking details will be obtained prior to inception of your policy.

PROTECTION OF PERSONAL INFORMATION

We at Phishield UMA (PTY) Ltd, respect your constitutional right to privacy. We are committed to and bound by the terms and provisions of the Protection of Personal Information Act 4 of 2013 ("POPIA") regarding the acquisition, usage, retention, transmission and deletion of your personal information. We will check and validate the information you provide through legal means. We have high level security measures in place to protect your personal information. Your personal information herein collected is for the primary purpose of providing you with insurance cover and for all other activities and processes incidental to and relevant to this purpose. Your information shall be kept confidential, however, we shall disclose it to certain third parties as required and other insurers for the specific purpose of insurance and to reduce and prevent any form of fraudulent activity. Sharing of information includes, but is not limited to, information sharing as arranged via the South African Insurance Association.

You hereby give consent and fully understand the reason for Phishield UMA to process, use, share and retain your personal information for its designated purpose and you confirm the accuracy of the information. You may request Phishield to amend, update, change or correct your personal information processed by us by sending a request to our offices on the following email address lilian@phishield.com For a full version of the Consent to process Personal Information is available on this link www.phishield.com for download.

Should you decide to cancel this insurance contract you further consent to Phishield UMA retaining the information in line with the legally permitted retention period, for statistical and reporting purposes only. Should you decide not to accept the proposal, the information collected, will be de-identified and only used for statistical and research purposes.

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POLICY HOLDER DECLARATION

I, the undersigned have made an informed decision to take out this policy without the benefit of a full financial needs analysis. Further, I warrant that I have taken note and understand the cover limits and the limitations of this policy.

I understand that this is an application for a binding insurance contract on the intermediary and myself and no further acceptance of terms and conditions or any other documents will be necessary for this contract to become binding other than the provision of bank details for premium collection. I further declare that all the information entered by me on my behalf is true and correct and should any further information be required, I will make this available to the Insurer as necessary for my policy or any query related to the policy. I am in no way entering this agreement with the knowledge of un-disclosed event or expected future event.

I understand that any misrepresentation, concealment of facts and/or non-disclosure in respect of information provided herein shall render my claim and policy null and void.

Signature of Policy Holder Date