

## **MEYER & ASSOCIATES INSURANCE BROKERS CC**

### **TREATING CUSTOMERS FAIRLY (TCF) POLICY**

Treating Customers Fairly is a core principle of our company and the way we conduct our business. We are constantly striving to improve our service and develop new and innovative ways to communicate our services and new product information to our clients. We commit to provide clear and concise information on all products marketed to the client.

The Key factors that determine our policy of treating customers fairly is as follows:

1. The client can be confident that they are dealing with a firm which holds the fair treatment of our customers
2. Products and services marketed are designed to meet the individuals needs of our customers.
3. Our customers are provided with clear information and are kept appropriately informed before, during and after the point of sale.
4. Where we offer advice to our customers, the advice is suitable and takes account of their individual circumstances.
5. Clients are provided with products that perform as we have led the customer to expect, and the associated service is at an acceptable standard to what they expect.
6. Customers will not face unreasonable post-sale barriers imposed to change products, switch providers, submit a claim or make a complaint.
7. Any complaints or grievances received from a client will be handled in a sympathetic, positive and professional manner.
8. Our customer's feedback is important to us. We want to know whether your experience with us lives up to your expectations. If you any feedback let us know, because your views are virtual to helping us to improve our services in the future.

**FSCA NAME – MEYER & ASSOCIATES INSURANCE BROKERS CC**  
**TELEPHONE NUMBER – 031 561 1107**  
**EMAIL ADDRESS – [melanie@eciadmin.co.za](mailto:melanie@eciadmin.co.za)**

Personal information that an individual submits is used only for the purpose for which it was intended. Copies of correspondence that may contain personal information, is stored in archives for record-keeping and back-up purposes only.

The FSCA will not, without an individual's consent, share information with any other third parties, for any purposes whatsoever.

## **SECURITY**

The FSCA strives to ensure the security, integrity and privacy of personal information submitted. The FSCA will review and update its security measures in accordance with future legislation and technological advances. Unfortunately, no data transmission over the Internet can be guaranteed to be totally secure, however, the FSCA will endeavour to take all reasonable steps to protect the personal information, which an individual submits to the FSCA or to the FSCA's online products and services. The FSCA will always set the highest standards to ensure the integrity of their systems.

The FSCA may engage with other organizations to provide support services to the FSCA. Third Parties are obliged to respect the confidentiality of any personal information held by the FSCA. A Service Level agreement is in place with all Third parties to ensure adherence to all Privacy Policies.

The FSCA's employees are obliged to respect the confidentiality of any personal information held by the FSCA. All employees are required to sign an employment contract which includes a confidentiality clause.

The FSCA will not reveal any personal information to anyone unless:

- It is compelled to comply with legal and regulatory requirements or when it is otherwise allowed by law
- It is in the public interest

The FSCA needs to do so to protect their rights

The FSCA endeavours to take all reasonable steps to keep secure any information which they hold about an individual, and to keep this information accurate and up to date. If at any time, an individual discovers that information gathered about them is incorrect, they may contact the FSCA to have the information corrected.

The FSCA recognizes the importance of protecting the privacy of information collected about individuals, in particular information that is capable of identifying an individual ("personal information").

## CONTACT INFORMATION

Any questions relating to the FSCA's privacy policy or the treatment of an individual's personal data may be addressed to the contact details below:

Information officer: Melanie Meyer

Telephone number: 031 561 1107 / 083 231 4858

Fax number: 086 615 1620

Postal address: P.O. Box 57, Dolphin Coast, 4404

Physical address: 2<sup>ND</sup> Floor, Ferham House, Suite 203, 9 Stanley Grace Crescent, Umhlanga Rocks, 4320

Email address: melanie@meyerassociates.co.za

Website: www.meyerassociates.co.za

## TREATING CUSTOMERS FAIRLY (TCF)

The principals of TCF are well established in our business practice and it is a principal that we embrace. Should you be interested in the details of TCF, please click on the link below.

[https://www.fsb.co.za/Departments/fais/Documents/TCF Small FSCA Guide.pdf](https://www.fsb.co.za/Departments/fais/Documents/TCF%20Small%20FSCA%20Guide.pdf)



MEMBER  
LID