

PRIVACY NOTICE

In terms of the Protection of Personal Information Act 4 of 2013 (POPIA)

Responsible party	Synergy Business & Capital Advisory (Pty) Ltd
Information officer	Chris Maurice Kupsamy
Email	chrisk@sbcadvisory.co.za
Website	www.sbcadvisory.co.za
Effective date	June 2025
Version	1.0

1. Introduction

Synergy Business & Capital Advisory (Pty) Ltd ("Synergy", "we", "us", or "our") is committed to protecting your personal information. This Privacy Notice explains what personal information we collect, why we collect it, how we use it, and your rights in relation to it.

This notice applies to personal information collected through our website www.sbcadvisory.co.za, through our contact form, through email and telephone communications, and through the delivery of our advisory services.

We process personal information in accordance with the Protection of Personal Information Act 4 of 2013 (POPIA) and any other applicable South African law.

2. Who We Are

Synergy Business & Capital Advisory (Pty) Ltd is a senior executive advisory practice based in Johannesburg, South Africa. We provide supply chain transformation, profit intelligence, compliance and ESG advisory, capital mobilisation, performance management, and digital transformation services to organisations across Sub-Saharan Africa.

For the purposes of POPIA, Synergy is the Responsible Party in respect of personal information collected and processed in connection with its services and website.

3. What Personal Information We Collect

3.1 Information You Provide Directly

When you submit an enquiry through our website contact form, send us an email, or contact us by telephone, we may collect:

- Your full name
- Your email address
- Your telephone number
- Your job title and organisation
- The nature of your enquiry or message
- Any other information you choose to provide

3.2 Information Collected During Service Delivery

When we engage with you or your organisation as a client or prospective client, we may collect:

- Contact details of key personnel within your organisation
- Correspondence and meeting records
- Business information relevant to the engagement
- Financial and operational information (handled under confidentiality obligations)

3.3 Information Collected Automatically

When you visit our website, we may automatically collect:

- Your IP address and browser type
- Pages visited and time spent on the site

- Referring website
- Geographic location (country/city level only)

This information is collected via Google Analytics (GA4) and is used in aggregate, anonymised form to understand how visitors use our website. It is not used to identify you personally.

4. Why We Collect Your Personal Information

4.1 Lawful Basis for Processing

We collect and process personal information on the following lawful bases:

- To respond to your enquiry or request — processing is necessary to take steps prior to entering into a contract or at your request
- To deliver agreed advisory services — processing is necessary for the performance of a contract
- To comply with legal and regulatory obligations
- Where you have given us your consent
- For our legitimate business interests, where these are not overridden by your rights

4.2 Specific Purposes

We use your personal information for the following specific purposes:

- To respond to enquiries submitted through our website or by email
- To provide advisory services and fulfil engagement obligations
- To send you information about our services where you have requested this or where we have a legitimate interest in doing so
- To maintain records of our business activities and client relationships
- To comply with tax, legal, and regulatory obligations
- To improve our website and communications

5. How We Store and Protect Your Information

5.1 Storage

Your personal information is stored on secure cloud-based systems, including email servers and document management platforms. We use reputable third-party service providers who process data on our behalf and are subject to contractual data protection obligations.

5.2 Security

We implement appropriate technical and organisational measures to protect your personal information against unauthorised access, loss, destruction, or alteration. These measures include:

- Encrypted email and communications
- Password-protected access to systems
- Limited access to personal information on a need-to-know basis
- Regular review of security practices

5.3 Retention

We retain personal information only for as long as necessary for the purpose for which it was collected, or as required by law. Specifically:

- Website enquiry data — retained for 12 months from receipt unless an engagement follows
- Client engagement records — retained for 7 years from the end of the engagement, in line with tax and legal requirements
- Website analytics data — retained in accordance with Google Analytics' standard retention settings

6. Who We Share Your Information With

We do not sell, rent, or trade your personal information to third parties. We may share your information in the following limited circumstances:

- With service providers who assist us in operating our business — such as email providers, website hosting providers, and accounting software — who are bound by confidentiality and data protection obligations
- With our professional advisors — such as our auditors, tax practitioners, or legal advisors — where required
- Where required by law, court order, or regulatory authority
- In connection with a merger, acquisition, or sale of our business, subject to appropriate confidentiality protections

We do not transfer your personal information outside South Africa except where we have put in place appropriate safeguards as required by POPIA.

7. Your Rights

Under POPIA, you have the following rights in respect of your personal information:

Right of access

You have the right to request confirmation of whether we hold personal information about you, and to access that information. See our PAIA Manual for the procedure to follow.

Right to correction or deletion

You have the right to request that we correct inaccurate personal information, or delete personal information that is no longer necessary for the purpose for which it was collected.

Right to object

You have the right to object to the processing of your personal information where we are relying on our legitimate interests as the lawful basis for processing.

Right to withdraw consent

Where we are processing your personal information on the basis of your consent, you have the right to withdraw that consent at any time. Withdrawal of consent will not affect the lawfulness of processing carried out before withdrawal.

Right to lodge a complaint

You have the right to lodge a complaint with the Information Regulator if you believe we have processed your personal information in breach of POPIA.

Information Regulator contact: inforeg@justice.gov.za | complaints.IR@justice.gov.za | www.inforegulator.org.za

8. Cookies and Website Analytics

Our website uses Google Analytics (GA4) to collect anonymised data about how visitors use the site. Google Analytics uses cookies — small text files stored on your device — to collect this information.

The data collected includes pages visited, time on site, geographic location (country level), and browser type. This data is processed in aggregate and is not used to identify you personally.

You can opt out of Google Analytics tracking by installing the Google Analytics Opt-out Browser Add-on, available at tools.google.com/dlpage/gaoptout.

Our website does not use advertising cookies, tracking pixels, or social media cookies beyond standard analytics.

9. Contact Form

Our website includes a contact form powered by Formspree (formspree.io). When you submit the contact form, your name, email address, telephone number, and message are transmitted to Formspree's servers and forwarded to our email address.

Formspree processes this data on our behalf and is subject to its own privacy policy, available at formspree.io/legal/privacy-policy. We use Formspree solely to receive and respond to enquiries.

10. How to Exercise Your Rights

To exercise any of your rights, or to raise a privacy concern, please contact us:

- Email: chrisk@sbcadvisory.co.za
- Subject line: "Privacy Request" or "Privacy Complaint"

- We will respond within 30 days of receipt

We may need to verify your identity before processing your request.

11. Changes to this Privacy Notice

We may update this Privacy Notice from time to time to reflect changes in our practices, technology, or legal requirements. The most current version will always be available on our website at www.sbcadvisory.co.za. Material changes will be communicated by a notice on our website.

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