



EFFICIENT GROUP (PTY) LTD

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THE PROMOTION OF ACCESS TO INFORMATION MANUAL

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1. INTRODUCTION

- 1.1. This Promotion of Access to Information Manual ("Manual") is published in terms of Section 51 of the Promotion of Access to Information Act, No. 2 of 2000 ("PAIA"), as amended by the Protection of Personal Information Act, No. 4 of 2013 ("POPIA"). This Manual gives effect to the constitutional right of access to information but recognises limitations to this right including, but not limited to, the reasonable protection of privacy, commercial confidentiality, and good governance.
- 1.2. The following annexures form part of this manual:
 - + **Annexure A:** Request for a Copy of the Guide from the Information Regulator
 - + **Annexure B:** Request for Access to Records in Terms of PAIA
 - + **Annexure C:** Fees in Respect of Access to Records
 - + **Annexure D:** Outcome of Request and Fees Payable
 - + **Annexure E:** Request for Record/Description of Personal Information in Terms of POPIA
 - + **Annexure F:** Objection to the Processing of Personal Information in Terms of POPIA
 - + **Annexure G:** Request for Correction/Deletion/Destruction of Personal Information in Terms of POPIA

2. OBJECTIVE

The objective of this Manual is for you to:

- 2.1. check the categories of records held by the Efficient Group (see 3.2) that are available without a person having to submit a formal PAIA request;
- 2.2. have a sufficient understanding of how to make a request for access to a record of the Efficient Group by providing a description of the subjects on which the Efficient Group holds records and the categories of records held on each subject;
- 2.3. know the description of the records of the Efficient Group which are available in accordance with any other legislation;
- 2.4. access the relevant contact details of the Information Officer and any Deputy Information Officer who will assist the public with the records they intend to access
- 2.5. know how to obtain access to the guide on how to use PAIA, as updated by the Information Regulator;
- 2.6. understand whether the Efficient Group processes personal information, the purpose of such processing, and the categories of data subjects and information or categories of information relating to them;
- 2.7. know the recipients or categories of recipients to whom personal information may be supplied;

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- 2.8. know whether the Efficient Group has planned to transfer or process personal information outside the Republic of South Africa and, if so, the recipients or categories of recipients to whom the personal information may be supplied; and
- 2.9. know whether the Efficient Group has appropriate security measures to ensure the confidentiality, integrity, and availability of the personal information which is processed.

3. SCOPE AND OVERVIEW

- 3.1. The Efficient Group (Pty) Ltd is a private company duly incorporated in the Republic of South Africa and is the holding company of subsidiaries providing financial services. This Manual applies to the Efficient Group (Pty) Ltd and all of its subsidiaries including any successor entities or entities forming part of the Group from time to time. For purposes of this Manual, the subsidiaries include, but are not limited to, the following:
 - + Dinamika Fonds Bestuurder (Pty) Ltd
 - + Efficient Corporate Solutions (Pty) Ltd
 - + Efficient Financial Services (Pty) Ltd
 - + Efficient Insure Advisory Services (Pty) Ltd
 - + Efficient Private Clients (Pty) Ltd
 - + Efficient Select (Pty) Ltd
 - + Naviga Solutions (Pty) Ltd
 - + Select Manager (Pty) Ltd
 - + Vantage Invest (Pty) Ltd
 - + Vantage Life Ltd
 - + Vantage Nominees (RF) (Pty) Ltd
 - + Vantage Technologies (Pty) Ltd
- 3.2. The Efficient Group (Pty) Ltd and its subsidiaries will collectively be referred to as “the Efficient Group” in this Manual.

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4. DEFINITIONS AND ACRONYMS

In this Manual, unless the context otherwise indicates:

CEO	means Chief Executive Officer.
Client	means any natural or juristic entity that receives services from the Efficient Group.
Data subject	means the person to whom personal information relates as defined in POPIA.
Employee	means full-time and part-time employees of the Efficient Group, whether temporary or permanent, including directors, contract workers, interns, and licensed representatives.
PAIA	means the Promotion of Access to Information Act, No. 2 of 2000.
Personal information	means information relating to you that includes, but is not limited to: a. information relating to race, gender, sex, pregnancy, marital status, nationality, ethnic or social origin, colour, sexual orientation, age, physical or mental health, well-being, disability, religion, conscience, belief, culture, language, and birth; b. information relating to education, medical-, financial-, criminal- or employment history; c. any identifying number, symbol, e-mail address, physical address, telephone number, location information, online identifier, or other particular assignment to you; d. biometric information; e. personal opinions, views, or preferences; f. correspondence sent by you that is implicitly or explicitly of a private or confidential nature, or further correspondence that would reveal the contents of the original correspondence; g. your opinions or views about another individual; and h. your name, if it appears with other personal information relating to you, or if the disclosure of your name itself would reveal information about you.
POPIA	means the Protection of Personal Information Act, No. 4 of 2013.

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Record	means any recorded information: a. regardless of form or medium; b. in the possession or under the control of the Efficient Group, respectively; and c. whether or not it was created by the Efficient Group, respectively.
Requestor	means the person requesting access to the records.

5. CONTACT DETAILS FOR ACCESS TO INFORMATION OF THE EFFICIENT GROUP

5.1. For any information or procedures referred to in this Manual, or to submit a request in terms of PAIA or POPIA, please contact the Efficient Group Information Officer Mr Heiko Weidhase, or, the Deputy Information Officer, Anton de Klerk, using the details provided below.

- + Head office physical address: 81 Dely Road, Hazelwood, Pretoria, 0081
- + Telephone number: +27 (87) 944 7999
- + Website address: www.efgroup.co.za
- + E-mail address: info@efgroup.co.za
- + Online enquiry: <https://www.efgroup.co.za/contact-us/enquiry-form/> (choose Personal Information Enquiry)

6. GUIDE ON HOW TO USE PAIA AND HOW TO OBTAIN ACCESS TO THE GUIDE

- 6.1. The Information Regulator has compiled an official guide containing information to assist any person who wishes to exercise rights in terms of PAIA and POPIA.
- 6.2. The guide is available from the Information Regulator in the official languages and in Braille.
- 6.3. The official guide contains a description of:
- 6.3.1. the objects of PAIA and POPIA;
 - 6.3.2. the postal and street address, phone and fax number and, if available, electronic mail address of
 - 6.3.2.1. the Information Officer of every public body; and
 - 6.3.2.2. every Deputy Information Officer of every public and private body designated in terms of Section 17(1) of PAIA and Section 56 of POPIA;
 - 6.3.3. the manner and form of a request for access to a record of a public body contemplated in Section 11 of PAIA and access to a record of a private body contemplated in Section 50 of PAIA;
 - 6.3.4. the assistance available from the Information Officer of a public body in terms of PAIA and POPIA;

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- 6.3.5. the assistance available from the Information Regulator in terms of PAIA and POPIA;
- 6.3.6. all remedies in law available regarding an act or failure to act in respect of a right or duty conferred or imposed by PAIA and POPIA, including the manner of lodging
 - 6.3.6.1. an internal appeal;
 - 6.3.6.2. a complaint to the regulator; and
 - 6.3.6.3. an application with a court against a decision by the Information Officer of a public body, a decision on internal appeal, or a decision by the Information Regulator or a decision of the head of a private body;
- 6.3.7. the provisions of Sections 14 and 51 of PAIA requiring public bodies and private bodies, respectively, to compile a manual, and how to obtain access to a manual;
- 6.3.8. the provisions of Sections 15 and 52 of PAIA providing for the voluntary disclosure of categories of records by public bodies and private bodies, respectively;
- 6.3.9. the notices issued in terms of Sections 22 and 54 of PAIA regarding fees to be paid in relation to requests for access; and
- 6.3.10. the regulations made in terms of Section 92 of PAIA.
- 6.4. Members of the public can inspect or make copies of the official guide from the offices of the public and private bodies, including the office of the Information Regulator, during normal working hours.
- 6.5. The official guide can also be obtained upon request from the Information Officer or from the Information Regulator's website. Any request for a copy of the official guide from the Information Officer may be made using ANNEXURE A (or in substantially the same form).
- 6.6. Any queries regarding the official guide must be directed to the Information Regulator using the following details:
 - + Physical address: Woodmead North Office Park, 54 Maxwell Drive, Woodmead, Johannesburg, 2191
 - + Postal address: P.O. Box 31533, Braamfontein, Johannesburg, 2017
 - + Telephone Number: 010 023 5200
 - + Website: <https://infoeregulator.org.za>
 - + E-mail: enquiries@infoeregulator.org.za
- 6.7. For PAIA complaints, use the following details:
 - + PAIAComplaints@infoeregulator.org.za
- 6.8. A copy of the official guide is also available at the Efficient Group head office in English and Afrikaans for public inspection during normal office hours.

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7. CATEGORIES OF RECORDS HELD BY THE EFFICIENT GROUP WHICH ARE AVAILABLE WITHOUT A PERSON HAVING TO REQUEST ACCESS

- 7.1. Records made available by the Efficient Group without a person having to request access in terms of PAIA are located on its website. These include:
- 7.1.1. the Efficient Group's profile;
 - 7.1.2. the Group's areas of expertise and specialist profiles;
 - 7.1.3. Group news, publications, and press releases;
 - 7.1.4. Group brochures and marketing material;
 - 7.1.5. the Efficient Group's Privacy Policy, Conflict of Interest Management Policy, Treating Customers Fairly Policy, and Anti-Bribery and Corruption Policy;
 - 7.1.6. this PAIA Manual; and
 - 7.1.7. the Group's disclaimers and terms of business.

8. DESCRIPTION OF THE RECORDS OF THE EFFICIENT GROUP WHICH ARE AVAILABLE IN ACCORDANCE WITH ANY OTHER LEGISLATION

- 8.1. The Efficient Group holds records in accordance with the legislation applicable to its business operations, regulated activities, employment obligations, tax obligations, and corporate governance requirements.
- 8.2. The following table provides a non-exhaustive description of the categories of records that may be held in terms of such legislation. The inclusion of a category of record does not mean that access to such record will automatically be granted, as each request will be considered in accordance with PAIA, POPIA, and any other applicable law.

LEGISLATION	CATEGORY OF RECORDS
Basic Conditions of Employment Act, No. 75 of 1997	+ Employee's records + Employee's contracts of employment
Broad-Based Black Economic Empowerment (B-BBEE) Act, No. 53 of 2003	+ B-BBEE certificates or sworn affidavits + B-BBEE verification reports and supporting documentation
Collective Investment Schemes Control Act, No. 45 of 2002	+ Co-naming agreements + Discretionary investment management mandates + Portfolio management agreements + Investment mandates

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Companies Act, No. 71 of 2008	+ Memorandum of Incorporation + Share registers and securities registers + Directors' records and resolutions + Annual returns and CIPC records + Minutes of shareholder, board, and committee meetings + Annual financial statements
Compensation for Occupational Injuries and Diseases Act, No. 130 of 1993	+ Employees' particulars and remuneration records + Employees' medical reports pertaining to occupational injury or disease
Cybercrimes Act, No. 19 of 2020	+ Evidence relating to cybercrimes + Reports made to the South African Police Service + Notifications to the Information Regulator and affected persons
Electronic Communications and Transactions Act, No. 25 of 2002	+ E-mail records
Employment Equity Act, No. 55 of 1998	+ Employment equity plans and reports + Skills development and training records
Financial Advisory and Intermediary Services Act, No. 37 of 2002	+ Financial Services Provider ("FSP") licences and representative registers + Compliance reports and monitoring records + Records of advice + Disclosure documents and mandates + Complaints register + Conflict of interest register and policy + Debarment records, where applicable + Fit and proper/competence records
Financial Intelligence Centre Act, No. 38 of 2001	+ Risk Management and Compliance Programme ("RMCP") + Anti-Money Laundering and Counter Terrorist Financing ("AML/CTF") Policy + Client due diligence records

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	+ Reports to the Financial Intelligence Centre (FIC)
Financial Markets Act, No. 19 of 2012	+ Personal account trading procedure and records
Financial Sector Regulation Act, No. 9 of 2017	+ Regulatory returns and correspondence + Licence applications, approvals, and conditions + Statutory registers required by the relevant sector legislation
Income Tax Act, No. 58 of 1962	+ Income tax returns and assessments, + Tax computations, + IRP5/IT3(a) records, + Dividend tax records, withholding tax records, + Tax clearance or tax compliance status records, + SARS correspondence, + Accounting records, and financial statements used for income tax purposes.
Labour Relations Act, No. 66 of 1995	+ Disciplinary and grievance records + CCMA and Labour Court correspondence
Occupational Health and Safety Act, No. 85 of 1993	+ Health and safety policies, + workplace risk assessments, + appointment letters for health and safety representatives or responsible persons, + incident and accident reports, + occupational injury or disease reports, inspection records, emergency evacuation records, + training and awareness records, + health and safety committee records and correspondence with the Department of Employment and Labour, where applicable.
Pension Funds Act, No. 24 of 1956	+ Employee pension or retirement fund membership records, contribution schedules, + payroll deduction records, + employer participation agreements,

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	+ trustee or fund correspondence,
Protection of Constitutional Democracy against Terrorist and Related Activities Act, No. 33 of 2004	+ Terrorist financing and sanctions screening records, client and beneficial ownership screening results, records of property associated with designated persons or entities, escalation and investigation records, reports or notifications to the FIC or other competent authorities, account or transaction restriction records, and related AML/CFT compliance records, where applicable.
Prevention and Combating of Corrupt Activities Act, No. 12 of 2004	+ Anti-bribery and corruption policies and procedures + Gifts and entertainment registers + Conflicts of interest declarations + Procurement records + Due diligence records for service partners and providers + Whistleblowing reports + Internal investigation records + Disciplinary or remedial action records + Correspondence with law-enforcement or regulatory authorities, where applicable
Protection of Personal Information Act, No. 4 of 2013	+ Privacy policy + Records of processing activities + Data subject request records + Consent records, where applicable + Operator agreements + Information security incident/breach records + Information Officer and Deputy Information Officer records
Short-term Insurance Act, No. 53 of 1998	+ Intermediary, binder, and outsourcing agreements + Records relating to FSP subsidiaries acting as binder holders, binder-function mandates and authority limits + Binder reporting and performance-monitoring records + Insurer oversight and audit records + Statutory returns + Regulatory correspondence

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	+ Policyholder protection records and records relating to the collection and payment of premiums, where applicable
Skills Development Act, No. 97 of 1998	+ Workplace skills plans + Annual training reports + Skills development and training records + Training needs analyses + Learnership and internship records + SETA registration and correspondence + Mandatory or discretionary grant applications + Training attendance registers + Training provider records and records supporting B-BBEE skills development reporting, where applicable
Tax Administration Act, No. 28 of 2011	+ Tax returns and assessments + Supporting tax documentation + SARS correspondence
Unemployment Insurance Act, No. 63 of 2001	+ UIF registration records + Employee declarations + Employee remuneration and contribution records + UIF returns and submissions + Proof of payment of UIF contributions
Unemployment Insurance Contributions Act, No. 4 of 2002	+ UIF contribution records + Employee remuneration records + Payroll records + SARS submissions + Reconciliation records + Employer registration records
Value Added Tax ("VAT") Act, No. 89 of 1991	+ VAT registration records + VAT returns and assessments + Tax invoices

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- + Input and output VAT records
- + VAT reconciliations
- + SARS correspondence relating to VAT

9. DESCRIPTION OF THE SUBJECTS ON WHICH THE EFFICIENT GROUP HOLDS RECORDS AND CATEGORIES OF RECORDS HELD ON EACH SUBJECT

- 9.1. The categories of records held by the Efficient Group are listed in the table that follows, according to the respective departments.
- 9.2. A category of record in this Manual does not imply that a request for access to such a record will be granted.
- 9.3. All requests for access are evaluated on a case-by-case basis by the Information Officer or Deputy Information Officer.

DEPARTMENT	CATEGORY
Company Secretarial	+ Statutory company records + Minutes and related meeting information + Records of executive-, board-, and shareholder decisions, and related documentation + Terms of reference for the board and board committees + Shareholder information
Compliance	+ Compliance policies and procedures + Regulatory and industry body reports + Compliance reports + Complaints register + Gifts register + Training register + Conflict of interest register + Environment, social and governance impact records
Executive office	+ Strategic plans + Research information belonging to the Efficient Group, whether conducted itself or commissioned from a third party + Succession plans

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Finance	+ Invoices + Finance-related policies and procedures + Audit records + Annual financial statements + Asset register + Rental agreements + Bank statements + Management accounts + Tax, VAT and Pay as Your Earn ("PAYE") records + Payroll + Procurement records + Service provider information + Going concern assessments
Human resources	+ Employee records + Employment contracts + Employment-related policies and procedures + Employment equity records + Training/learning and development records + Reports to industry body and government
Information Technology ("IT")	+ IT policies and procedures + IT strategy + System and data management records + Security and access control records + Contracts or vendor information + Disaster recovery plan
Legal	+ Legal opinions, advice, memoranda, and privileged communications, where applicable + Litigation, dispute resolution, claims, demand letters, and settlement records

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	+ Regulatory, statutory, and legal compliance correspondence, filings, and notices + Intellectual property, trademarks, domain names, licences, and related records
Marketing	+ Market information + Media releases + Marketing and communication policies + Internal publications and newsletters + Client communication by e-mail or SMS + Advertising and promotional material + Social media and brand reputation management guidelines
Operations	+ Standard operating procedures + Operational records + Client personal information records + Transactional records + Service agreements entered into with third parties
Risk	+ Enterprise risk management frameworks + Risk reports and monitoring + Risk policies and procedures + Risk register and assessments + Business continuity plan + Health, safety, and environment records + Professional indemnity and fidelity insurance + Cyber insurance policies

10. REQUEST PROCEDURE FOR ACCESS TO RECORDS IN TERMS OF PAIA

- 10.1. The requestor must complete the prescribed form, included in ANNEXURE B of this Manual. The request form must be addressed to the Information Officer using the contact details in this Manual. All requests will be evaluated and considered by the Information Officer or Deputy Information Officer.
- 10.2. The request form must be completed with sufficient detail to enable the Efficient Group to identify the record requested and to process the request in accordance with PAIA. If a

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request does not comply with the prescribed formalities, the requestor may be asked to complete or rectify the request in order to enable it to be processed.

- 10.3. Delays in processing may arise where a request is incomplete, unclear, or not accompanied by the information reasonably required to process it.
- 10.4. Proof of identity is required to authenticate the identity of the requestor. If the requestor acts as an agent, proof of the identity of the agent and of the requestor is required, as well as the authority or mandate given to the agent of the requestor.
- 10.5. Fees may be payable in respect of requests for access to records, as prescribed by PAIA and the applicable regulations. The applicable fees are set out in ANNEXURE C to this Manual.
- 10.6. A bank deposit is the accepted payment method for requests for access to records. Where a request fee is payable in terms of PAIA, the request will be processed in accordance with PAIA once the applicable fee has been paid.
- 10.7. Requests for access to records will be dealt with as soon as reasonably possible and, subject to PAIA, within thirty (30) days after receipt of the request.
 - 10.7.1. If an extension of time is required in terms of PAIA, the requestor will be notified in writing of the extension, the reasons for the extension, and any other information required by PAIA.
 - 10.7.2. If access to the requested record is granted, such access will be given in accordance with PAIA, subject to payment of any applicable access fee, and in compliance with any other applicable procedural requirements.
- 10.8. The Information Officer or Deputy Information Officer shall decide whether to grant the requested access to records and inform the requestor accordingly.
 - 10.8.1. Section 17 of PAIA stipulates that the disclosure of a record is compulsory if:
 - 10.8.1.1. the disclosure reveals evidence of a substantial contravention of, or failure to comply with, the law; or
 - 10.8.1.2. there is an imminent and serious public-safety or environmental risk, and the public interest in the disclosure of the record in question clearly outweighs the harm contemplated by its disclosure.
 - 10.8.2. The requestor shall be notified of the decision in the most expedient manner possible.
 - 10.8.3. If the Information Officer or Deputy Information Officer has searched for a record and it is believed that the record either does not exist or cannot be found, the requestor will be notified accordingly. The notification will include a summary of all the steps taken to find the record in question or to determine whether the record exists.
- 10.9. If the request for access to a record concerns a record that may affect the rights of a third party, the Information Officer or Deputy Information Officer will notify such third party and

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follow the applicable procedure prescribed by PAIA before making a decision on the request. If the request is refused, the requestor will be provided with written reasons for the refusal.

11. GROUNDS FOR THE REFUSAL OF ACCESS IN TERMS OF PAIA

- 11.1. Access to records may be refused on one or more of the grounds provided for in PAIA. These include, without limitation, the following:
- 11.1.1. The unreasonable disclosure of personal information of a third party who is a natural person.
 - 11.1.2. The disclosure of commercial information of a third party, including trade secrets, financial-, commercial-, scientific-, or technical information, the disclosure of which could likely cause harm to the commercial or financial interests of that third party, or information supplied in confidence by a third party the disclosure of which could reasonably be expected to prejudice that third party.
 - 11.1.3. The protection of confidential information if the disclosure would constitute a breach of a duty or confidence to a third party in terms of an agreement.
 - 11.1.4. The protection of confidential information of third parties if it is protected in terms of any agreement or legislation.
 - 11.1.5. The protection of the safety of individuals and the protection of property.
 - 11.1.6. The protection of records which would be regarded as privileged in legal proceedings. The protection of commercial activities of the Efficient Group, which may include:
 - 11.1.6.1. trade secrets;
 - 11.1.6.2. financial-, commercial-, scientific-, or technical information, of which disclosure could likely cause harm to the financial or commercial interests of the Efficient Group;
 - 11.1.6.3. information which, if disclosed, could put the Efficient Group at a disadvantage in negotiations or commercial competition; and
 - 11.1.6.4. a computer program which is owned by the Efficient Group and which is protected by copyright.
 - 11.1.7. The protection of research information of the Efficient Group or a third party, which disclosure would disclose the identity of the institution, the researcher, or the subject matter of the research, and would place the research at a serious disadvantage.
 - 11.1.8. Requests for information that are clearly frivolous or vexatious, or which involve an unreasonable diversion of resources.

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12. REMEDIES AVAILABLE TO A REQUESTOR ON THE REFUSAL OF ACCESS

- 12.1. There is no internal appeal procedure against a decision of the Information Officer or Deputy Information Officer of a private body in respect of a request made under PAIA. A requestor who is dissatisfied with a decision on a request for access may lodge a complaint with the Information Regulator and/or apply to a court of competent jurisdiction, as provided for in PAIA and applicable law.
- 12.2. Where a third party is affected by a decision to grant access to a record, such third party may exercise any rights or remedies available to it in terms of PAIA and applicable law.

13. PROCESSING PERSONAL INFORMATION IN TERMS OF POPIA

- 13.1. The Efficient Group processes personal information in accordance with POPIA and its Privacy Policy, which is available on the Efficient Group's website or on request from the Information Officer or Deputy Information Officer.
- 13.2. Any request for access to, confirmation of, correction to, deletion of, or destruction of personal information, or any objection to the processing of personal information, will be dealt with as soon as reasonably possible, but no later than thirty (30) days after receipt of the request, subject to POPIA and any other applicable law.
- 13.3. You may request access to, or a description of, the personal information that the Efficient Group holds about you, including the identity of, or categories of, third parties who have had access to your personal information. To do so, complete the form in ANNEXURE E and submit it to the Information Officer. Where permitted by applicable law, a fee may be charged as set out in ANNEXURE C. The Information Officer or Deputy Information Officer will notify you in advance of any amount payable.
- 13.4. You may, on reasonable grounds relating to your particular situation, object to the processing of your personal information by the Efficient Group where such processing is not required by law. To exercise this right, please complete ANNEXURE F and submit it to the Information Officer.
- 13.5. You may request the Efficient Group to correct personal information held about you if it is inaccurate, irrelevant, excessive, out of date, incomplete, misleading, or obtained unlawfully. To do so, complete ANNEXURE G and submit it to the Information Officer.
- 13.6. If you wish the Efficient Group to destroy or delete a record of personal information about you that we are no longer authorised to retain in terms of POPIA, please complete ANNEXURE G and submit it to the Information Officer.

14. AVAILABILITY OF THIS MANUAL

- 14.1. This Manual is available on the Efficient Group's website, at the Efficient Group's main offices during normal office hours, to any person upon request, and to the Information Regulator upon request.

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- 14.2. A request for a copy of this Manual may be submitted to the Information Officer using the contact details in this Manual.
- 14.3. This Manual is available in English.

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ANNEXURE A – REQUEST FOR A COPY OF THE GUIDE FROM THE INFORMATION REGULATOR

TO The Information Regulator
P.O. Box 31533
Braamfontein 2017

E-mail address enquiries@infoeregulator.org.za

Tel. number +27 (0) 10 023 5200 or 0800 017 160 (toll free)

OR

TO The Information Officer

REQUESTOR INFORMATION

I, full names and surname _____

In my capacity as _____
(mark with "X") Information Officer Other

Name of public/private body
(if applicable) _____

Postal address _____

Street address _____

E-mail address _____

Contact numbers Tel. (B) _____ Tel. (mobile) _____

Hereby request the following copy(ies) of the guide:

Language (make with "X")		No. of copies	Language (make with "X")		No. of copies
	Sepedi			Sesotho	
	Setswana			siSwati	
	Tshivenda			Xitsonga	
	Afrikaans			English	
	isiNdebele			IsiXhosa	
	isiZulu				

Manner of collection (mark with "X")	
Postal address	E-mail address

Signed at _____ on this _____ day of _____ 20_____

Signature of requestor

ANNEXURE B – REQUEST FOR ACCESS TO RECORDS IN TERMS OF PAIA

Note:

- + Proof of the requestor’s identity must be attached.
- + If a request is made on behalf of another person, proof of such authorisation must be attached to this form.

TO The Information Officer

Mark with an "X"

☐	This request is made in my own name	☐	This request is made on behalf of another person
--------------------------	-------------------------------------	--------------------------	--

PERSONAL INFORMATION

Full names	
Identity number	
Capacity in which request is made <i>(when made on behalf of another person)</i>	
Postal address	
Street address	
E-mail address	
Tel. (B)	
Tel. (mobile)	
Full names of person on whose behalf request is made <i>(if applicable)</i>	
Identity number	
Postal address	
Street address	
E-mail address	
Tel. (B)	
Tel. (mobile)	

PARTICULARS OF RECORD REQUESTED

Provide full particulars of the record to which access is requested. If the provided space is inadequate, please continue on a separate page and attach it to this form. All additional pages must be signed.

Description of record or relevant part
of the record

Reference number (if available)

Any further particulars of record

TYPE OF RECORD (Mark the applicable box with an "X")

Record is in written or printed form

Record comprises virtual images (this includes photographs, slides, video recordings, computer-generated images, sketches, etc.)

Record consists of recorded words or information which can be reproduced in sound

Record is held on a computer, or in an electronic, or machine-readable form

FORM OF ACCESS (Mark the applicable box with an "X")

Printed copy of record (including copies of any virtual images, transcriptions, and information held on a computer or in an electronic or machine-readable form)

Written or printed transcription or virtual images (this includes photographs, slides, video recordings, computer-generated images, sketches, etc.)

Transcription of soundtrack (written or printed document)

Copy of record on flash drive (including virtual images and soundtracks)

Copy of record on compact disc drive (including virtual images and soundtracks)

Copy of record saved on cloud-storage server

MANNER OF ACCESS (Mark the applicable box with an "X")

Personal inspection of record at registered address of public/private body (including listening to recorded words or information which can be reproduced in sound, or information held on computer, or in an electronic, or machine-readable form)

Postal services to postal address

Postal services to street address

Courier service to street address

Facsimile of information in written or printed format (including transcriptions)

E-mail of information (including soundtracks if possible)

Cloud share/file transfer

Preferred language (please provide)

Note that if the record is not available in the language you prefer, access may be granted in the language in which the record is available

PARTICULARS OF RIGHT TO BE EXERCISED OR PROTECTED

If the provided space is inadequate, please continue on a separate page and attach it to this Form. The requestor must sign all the additional pages.

Indicate which right is
to be exercised or protected

Explain why the record
requested is required for the
exercise or protection of the
aforementioned right

FEES

- + A request fee must be paid before the request will be considered.
- + You will be notified of the amount of the access fee to be paid.
- + The fee payable for access to a record depends on the form in which access is required, and the reasonable time required to search for and prepare a record.
- + If you qualify for exemption of the payment of any fee, please state the reason for exemption.

Reason	
--------	--

You will be notified in writing whether your request has been approved or denied and if approved the costs relating to your request, if any. Please indicate your preferred manner of correspondence

Postal address	E-mail address

Signed at _____ on this _____ day of _____ 20 _____

Signature of requestor/person on whose behalf the request is made

Name of requestor in capital letters

FOR OFFICIAL USE

Reference number

Request received by
(state rank, name and surname
of Information Officer)

Date received

Access fees

Deposit (if any)

Signature of Information Officer or Deputy Information Officer

ANNEXURE C – FEES IN RESPECT OF ACCESS TO RECORDS

Note: All amounts reflected in this Annexure C are exclusive of VAT, unless expressly stated otherwise.

Item	Description	Amount (Excl. VAT)
1	The request fee payable by every requestor	R140.00
2	Photocopy of A4-size page	R2.00 per page or part thereof
3	Printed copy of A4-size page	R2.00 per page or part thereof
4	For a copy in a computer-readable form on: (i) Flash drive (to be provided by requestor) (ii) Compact disc • If provided by requestor • If provided to the requestor	R40.00 R40.00 R60.00
5	For a transcription of visual images per A4-size page	Service to be outsourced. Will depend on quotation from the service provider
6	Copy of visual images	Service to be outsourced. Will depend on quotation from the service provider
7	Transcription of an audio record, per A4-size page	R24.00
8	Copy of an audio record on: (i) Flash drive (to be provided by requestor) (ii) Compact disc • If provided by requestor • If provided to the requestor	R40.00 R40.00 R60.00
9	To search for and prepare the record for disclosure for each hour or part of an hour, excluding the first hour, reasonably required for such search and preparation. To not exceed a total cost of	R145.00 R435.00
10	Deposit (<i>if search exceeds 6 hours</i>)	One third of amount per request calculated in terms of items 2 to 8
11	Postage, e-mail, or any other electronic transfer	Actual expense, if any

ANNEXURE D – OUTCOME OF REQUEST AND OF FEES PAYABLE

Note:

- + If your request is granted, the requested record/portion of the record will only be released once proof of full payment is received.
- + Please use the reference number below in all future correspondence.
- + Reference number: _____
- + All amounts reflected in this Annexure D are exclusive of VAT, unless expressly stated otherwise.

TO: _____

Your request dated _____, refers.

YOU REQUESTED

Personal inspection of information at the registered address of the Efficient Group (including listening to recorded words, information which can be reproduced in sound, or information held on a computer or in an electronic or machine-readable form) is free of charge. You are required to make an appointment for the inspection of the information and to bring this form with you. If you then require any form of reproduction of the information, you are liable for the corresponding fees listed in the table below.

OR

YOU REQUESTED

Printed copies of the information (<i>including copies of any virtual images, transcriptions, and information held on a computer or in an electronic or machine-readable form</i>)	
Written or printed transcription of virtual images (<i>this includes photographs, slides, video recordings, computer-generated images, sketches, etc.</i>)	
Transcription of soundtrack (<i>written or printed document</i>)	
Copy of information on flash drive (<i>including virtual images and soundtracks</i>)	
Copy of information on compact disc (<i>including virtual images and soundtracks</i>)	
Copy of record saved on cloud storage server	

TO BE SUBMITTED

Postal services to postal address	
Postal services to street address	
Courier service to street address	
Facsimile of information in written or printed format (<i>including transcriptions</i>)	
E-mail of information (<i>including soundtracks if possible</i>)	
Cloud share/file transfer	
Preferred language (<i>please provide</i>)	

Note that if the record is not available in the language you prefer, access may be granted in the language in which the record is available

KINDLY NOTE THAT YOUR REQUEST HAS BEEN:

Approved

Denied, for the following reasons:

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FEES PAYABLE WITH REGARDS TO YOUR REQUEST:

Item	Cost per A4-size page or part thereof/item	Number of pages/items	Total (excl. VAT)
Photocopy	R2.00		
Printed copy	R2.00		
For a copy in a computer-readable form on:			
(iii) Flash drive (to be provided by requestor)	R40.00		
(iv) Compact disc			
• If provided by requestor	R40.00		
• If provided to the requestor	R60.00		
For a transcription of visual images per A4-size page	Services may be outsourced. Will depend on quotation		
Copy of visual images	From the service provider		
Transcription of an audio record, per A4-size page	R24.00		
Copy of an audio record on:			
(iii) Flash drive (to be provided by requestor)	R40.00		
(iv) Compact disc			
• If provided by requestor	R40.00		
• If provided to the requestor	R60.00		
Postage, e-mail, or any other electronic transfer	Actual costs		
TOTAL			

Deposit payable (if search exceeds six hours):

Yes

No

Hours of search

Amount of deposit (*calculated
on one third of total amount per
request*)

The amount must be paid into the following bank account:

Name of bank

Name of account holder

Type of account

Account number

Branch code

Reference number

Submit proof of payment to

Signed at _____ on this _____ day of _____ 20 _____

Signature of Information Officer or Deputy Information Officer

ANNEXURE E – REQUEST FOR RECORD/DESCRIPTION OF PERSONAL INFORMATION IN TERMS OF POPIA

Note:

- + A request for access to or a description of personal information may entail a fee as outlined in **ANNEXURE C**.
- + You will be notified if a fee is payable, the amount of the request fee, as well as the banking details into which the fees must be paid.
- + The fee payable for access to or a description of a record depends on the form in which access is required, and the reasonable time required to search for and prepare a record.
- + Proof of identity and authority to act (if applicable) should accompany this request.

Full names and
surname/registered name if a
company

Identity number/unique identifier

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Residential or business address

Code ()

Contact number(s)

E-mail address

Full names and surname
of representative

Identity number of representative

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Authority to act (resolution,
mandate, birth certificate, etc)

DETAILS OF RESPONSIBLE PARTY

Registered name of the
responsible party

E-mail address

Signed at _____ on this _____ day of _____ 20 _____

Signature of data subject or representative

ANNEXURE F – OBJECTION TO THE PROCESSING OF PERSONAL INFORMATION IN TERMS OF POPIA

Note:

- + Affidavits or other documentary evidence as applicable in support of the objection may be attached.
- + If the space provided for in this form is inadequate, submit the information as an annexure to this form and sign each page.
- + Complete below as is applicable.

A - DETAILS OF DATA SUBJECT

Full names and surname/
registered name of data subject

Unique identifier/identity number

--	--	--	--	--	--	--	--	--	--	--	--	--	--

Residential, postal or business
address

Code ()

Contact number(s)

E-mail address

B - DETAILS OF RESPONSIBLE PARTY

Registered name of responsible
party

Business address

Code ()

C - REASONS FOR OBJECTION IN TERMS OF SECTION 11(1)(d) to (f)
(Please provide detailed reasons for the objection)

Signed at _____ on this _____ day of _____ 20 _____

Signature of data subject or representative

**ANNEXURE G – REQUEST FOR CORRECTION/DELETION/DESTRUCTION OF PERSONAL INFORMATION
IN TERMS OF POPIA**

Note:

- + Affidavits or other documentary evidence applicable in support of the request for correction, deletion, or destruction may be attached.
- + Proof of identification and authority to act should be submitted together with the completed form.
- + If the space provided in this form is inadequate, please submit information on a separate page as an annexure to this form and sign each page.
- + Complete the below as applicable.

A - DETAILS OF DATA SUBJECT

Full names and surname/
registered name of data subject

Unique identifier/identity number

--	--	--	--	--	--	--	--	--	--	--	--	--	--

Residential, postal or business
address

Code ()

Contact number(s)

E-mail address

B - DETAILS OF RESPONSIBLE PARTY

Registered name of responsible
party

Business address

Code ()

C - INFORMATION TO BE CORRECTED/DELETED/DESTROYED

D - REASONS FOR:

- **CORRECTION OR DELETION OF THE PERSONAL INFORMATION ABOUT THE DATA SUBJECT IN TERMS OF SECTION 24(1)(a) WHICH IS IN POSSESSION OR UNDER THE CONTROL OF THE RESPONSIBLE PARTY*; and/or**
- **DESTRUCTION OR DELETION OF A RECORD OF PERSONAL INFORMATION ABOUT THE DATA SUBJECT IN TERMS OF SECTION 24(1)(b) WHICH THE RESPONSIBLE PARTY IS NO LONGER AUTHORISED TO RETAIN***

*(*Please provide detailed reasons for the request)*

Signed at _____ on this _____ day of _____ 20 _____

Signature of data subject or representative