

# Privacy Statement

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<b>Privacy Statement</b>		<b>CBRE   EXCELLERATE</b>	
Document Number:	EFM-Com-Pol-00018	Revision Number:	02
Revision Date:	1 June 2025	Pages:	Page 2 of 13
Process Owner:	Thini Ngonyama	Process Sponsor:	Compliance

## TABLE OF CONTENTS

<b>1.</b>	<b>INTRODUCTION &amp; PURPOSE.....</b>	<b>3</b>
<b>2.</b>	<b>REFERENCES / APPLICABILITY .....</b>	<b>3</b>
<b>3.</b>	<b>TERMS, ABBREVIATIONS &amp; EDITIONS.....</b>	<b>3</b>
<b>4.</b>	<b>WHAT INFORMATION DO WE COLLECT.....</b>	<b>6</b>
<b>5.</b>	<b>FOR WHAT PURPOSE DO WE COLLECT INFORMATION? .....</b>	<b>7</b>
<b>6.</b>	<b>HOW DO WE COLLECT YOUR INFORMATION? .....</b>	<b>8</b>
<b>7.</b>	<b>WHO RECEIVES YOUR INFORMATION? .....</b>	<b>9</b>
<b>8.</b>	<b>THIRD PARTY COUNTRY TRANSFER.....</b>	<b>9</b>
<b>9.</b>	<b>MARKETING.....</b>	<b>9</b>
<b>10.</b>	<b>HOW LONG DO WE RETAIN YOUR INFORMATION? .....</b>	<b>10</b>
<b>11.</b>	<b>SECURITY BREACHES.....</b>	<b>10</b>
<b>12.</b>	<b>YOUR RIGHTS AS A DATA SUBJECT .....</b>	<b>10</b>
<b>13.</b>	<b>THE INFORMATION REGULATOR .....</b>	<b>12</b>
<b>14.</b>	<b>UPDATES TO THIS PRIVACY STATEMENT .....</b>	<b>12</b>
<b>15.</b>	<b>REVISION HISTORY .....</b>	<b>Error! Bookmark not defined.</b>
<b>16.</b>	<b>APPROVAL &amp; DATES .....</b>	<b>Error! Bookmark not defined.</b>

<b>Privacy Statement</b>		<b>CBRE   EXCELLERATE</b>	
Document Number:	EFM-Com-Pol-00018	Revision Number:	02
Revision Date:	1 June 2025	Pages:	Page 3 of 13
Process Owner:	Thini Ngonyama	Process Sponsor:	Compliance

## 1. INTRODUCTION & PURPOSE

- 1.1 The CBRE Excellerate Holdings Limited and its Subsidiaries (hereafter also referred to as "CBRE Excellerate") a cluster of companies that renders various property and facilities management services. We respect your privacy and are committed to keeping your Information secure and confidential.
- 1.2 This Privacy Statement explains how we Process the Information we collect from you and also informs you of your rights in terms of the Protection of Personal Information Act, Act No. 4 of 2013 ("PoPIA"). You have the right to be notified that your Information is being collected, which is why this Privacy Statement has been brought to your attention and is important to you.
- 1.3 Important: If you are one of our Data Subjects, you agree that we may Process your Information as explained under this Privacy Statement. In the relevant agreement or terms and conditions pertaining to those services, you may provide us with your consent to Process your Information and agree that we may Process it for the purposes as described in such agreement or terms and conditions (in addition to the purposes described in this Privacy Statement).

## 2. REFERENCES / APPLICABILITY

- 2.1 We understand that we are accountable and responsible for Information under our control either as a Responsible Party or an Operator.
- 2.2 This Privacy Statement applies to all companies within CBR Excellerate. These companies and their addresses include, amongst others:

CBR Excellerate Real Estate Services (Pty) Ltd	CBR Excellerate on Summit, 3A Summit Road, Dunkeld West, 2196
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## 3. TERMS, ABBREVIATIONS & EDITIONS

**"Automated Decisions"** is when your Information is analysed to form a profile of a person or category of persons to make a decision without human intervention.

**"Biometric Information"** is information resulting from specific technical processing relating to the physical, physiological, or behavioural characteristics of a natural person, which allow or confirm the unique identification of that natural person, such as facial images or dactyloscopy data.

**"Chief Information Officer"** means the registered Information Officer within CBRE Excellerate (PTY) Limited.

**"Children's Information"** is PI or SPI relating to a natural person under the age of 18

<b>Privacy Statement</b>		<b>CBRE   EXCELLERATE</b>	
Document Number:	EFM-Com-Pol-00018	Revision Number:	02
Revision Date:	1 June 2025	Pages:	Page 4 of 13
Process Owner:	Thini Ngonyama	Process Sponsor:	Compliance

years who is not legally competent, without the assistance of a competent person, to take any action or decision in respect of any matter concerning him- or herself.

**"Consent"** means the voluntary, specific, and informed expression of will in terms of which permission is given for the processing of Information.Content

**"Data"** means all types of information that is used by CBRE Excellerate. CBRE Excellerate has the following four (4) levels of information (which is collectively referred to as "Data"):

- Highly sensitive information;
- Sensitive information;
- Private and confidential information (which is collectively referred to as "Information"); and
- Public information.

**"Data Subject/s"** means the person (e.g. staff, clients, contractors) to whom the Information relates to. (e.g. natural person or juristic person/legal entity, whose Information is being processed by CBRE Excellerate on behalf of its staff, clients, contractor and/or on CBRE Excellerate's behalf by third parties and Operators such as service providers or contractors.)

**"Deleted/Destruction"** is when the Information no longer exists in a form that is on any use of.

**"Deputy Information Officer"** is an individual in CBRE Excellerate to whom the Chief Information Officer and/or Entity Information Officer has delegated some of their powers and duties in terms of PoPIA.

**"Direct marketing"** means to approach a Data Subject, either in person or by mail or electronic communication, for the direct or indirect purpose of:

- promoting or offering to supply, in the ordinary course of business, any goods or services to the Data Subject; or
- requesting the Data Subject to make a donation of any kind for any reason.

**"Entity Information Officer"** means the registered Information Officer for each of the Subsidiaries within CBRE Excellerate.

**"Information Assets"** means all Systems, Electronic Devices, and Information in whichever form (electronic, audible, hard copy or physical) which CBRE Excellerate owns or is responsible for, including CBRE Excellerate Information, Data Subject Information and Third-Party Information.

**"Information"** is a collective term used for PI, SPI, and Children's Information.

**"Information Officer"** means a person or persons acting on behalf of CBRE Excellerate and who is responsible for discharging the duties and responsibilities assigned to the "head" of CBRE Excellerate as prescribed in terms of PoPIA.

**"Information Regulator"** is a South African body which is empowered to monitor and enforce compliance by private bodies in terms of PoPIA.

**"Operator"** is a person who Processes Information for a Responsible Party in terms of a contract or mandate, without coming under the direct authority of that party.

<b>Privacy Statement</b>		<b>CBRE   EXCELLERATE</b>	
Document Number:	EFM-Com-Pol-00018	Revision Number:	02
Revision Date:	1 June 2025	Pages:	Page 5 of 13
Process Owner:	Thini Ngonyama	Process Sponsor:	Compliance

**“Personal Information (“PI”)”** means the PI of a living natural person / individual, or an existing legal entity / juristic person. Examples include the following information:

- Race;
- Gender;
- Sex;
- Pregnancy;
- marital status;
- Nationality;
- Ethnicity;
- Registration number, address of a juristic person;
- Education, medical, financial, criminal or employment history;
- any identifying number, symbol, e-mail address, physical address, telephone number, etc.).

**“Process / Processed / Processing”** means any operation or activity or any set of operations, whether by automatic means or not, concerning Information, including but not limited to:

- the collection, receipt, recording, organisation, collation, storage, updating or modification, retrieval, alteration, consultation, or use;
- dissemination by means of transmission, distribution or making available in any other form; or
- merging, linking, as well as restriction, degradation, erasure, or destruction of information.

**“Requester”** means any person making a request to access a record that is under the control of CBRE Excellerate. There are two types of requesters which is detailed below:

- Personal Requester - means a requester/Data Subject who is seeking to access a record containing Information about themselves; and
- Other Requester/Third Party - means any natural or juristic person, other than the requestor, or such party acting on behalf of the requester, or CBRE Excellerate itself.

**“Record”** means any recorded Information, regardless of form or medium. Examples include the following:

- Writing on any material;
- Information produced;
- recorded or stored by means book, map, plan, graph, or drawing; or
- photograph, film, negative, tape or other device in which one or more visual images;

which are in the possession or under the control of a Responsible Party; whether it was created by a Responsible Party; and regardless of when it came into existence.

**“Responsible Party”** means a natural or legal person, public authority, agency, or other body which, alone or jointly with others, determines the purposes and means of the Processing of Information.

**“Security Compromise”** means the unauthorised disclosure, modification, substitution, or use of Data (e.g., keys, metadata, or other security-related information) or the unauthorised modification of a security-related system, device, or Process to gain unauthorised access.

<b>Privacy Statement</b>		<b>CBRE   EXCELLERATE</b>	
Document Number:	EFM-Com-Pol-00018	Revision Number:	02
Revision Date:	1 June 2025	Pages:	Page 6 of 13
Process Owner:	Thini Ngonyama	Process Sponsor:	Compliance

**“Senior Management”** means an individual at the highest level of CBRE Excellerate’s management who has the day-to-day tasks of managing that organization.

**“Special Personal Information (“SPI”)** as referred to in Section 26 of PoPIA, includes the following:

- religious or philosophical beliefs;
- race or ethnic origin;
- Trade union membership;
- political persuasion;
- health or sex life;
- biometric information; or
- criminal behaviour.

**“Subsidiaries”** is a company owned or controlled by CBRE Excellerate (Pty) Limited.

**“System/s”** includes Information Systems and is a general term considered as encompassing any application, network, infrastructure hardware, component, server, voice, control (for example key cards), systems, database, internet, email, and any other device and/or solution.

**“Unique Identifiers and account numbers”** is any identifier that is assigned to a Data Subject and is used by a Responsible Party for the purposes of the operations of that Responsible Party and that uniquely identifies that Data Subject in relation to that Responsible Party.

## 4. WHAT INFORMATION DO WE COLLECT

4.1 Information is defined in PoPIA and means information relating to an identifiable, living natural person, and where it is applicable, an identifiable, existing juristic person.

4.2 Depending on the type of business we conduct with you or the relationship you have with us, we may Process the following types of PI:

- name
- race
- gender
- marital status
- nationality
- age
- language preference
- date of birth
- information relating to education, financial, criminal or employment history of a person
- identifying numbers such as identity or passport number, tax identification numbers or tax reference numbers
- e-mail address
- physical address
- telephone number

<b>Privacy Statement</b>		<b>CBRE   EXCELLERATE</b>	
Document Number:	EFM-Com-Pol-00018	Revision Number:	02
Revision Date:	1 June 2025	Pages:	Page 7 of 13
Process Owner:	Thini Ngonyama	Process Sponsor:	Compliance

- 4.3 We do not Process SPI in the ordinary course of business although SPI might be Processed in certain instances. We will Process SPI only if we obtain your consent or have another valid justification to do so. We may process the following types of SPI:
- 4.4 CBRE Excellerate will Process Children's Information only if the law permits. In the normal course of business, a competent person such as a parent or guardian will consent to the Processing of the Information of the child. We may process the following types of Children's Information.

## 5. FOR WHAT PURPOSE DO WE COLLECT INFORMATION?

- 5.1 In order for us to provide Data Subjects with services they have requested and to notify them of important changes to such services, we need to collect, use and disclose the Information of our Data Subjects, their representatives, controlling persons of entities, business contacts, staff of clients and service providers. We collect and use Information in order to conclude a contract (e.g. employment contract or third-party agreements) with our Data Subjects and to carry out the obligations in terms of that contract (including managing the account and complying with instructions and requests). We also Process contact information so that we can report to our Data Subjects (e.g. staff, clients, contractors) and keep them informed of the status of any instruction.
- 5.2 We have regulatory obligations, including compliance with anti-money laundering legislation, which require us to Process your Information. This includes verifying your identity or the identity of your beneficial owner and/or controlling persons.
- 5.3 We may also use your information to pursue our legitimate interests such as to compile reports, to comply with requests for information from any internal or external auditor, or any regulatory or supervisory body, or to correspond with you.
- 5.4 We do not make automated decisions. If we make any automated decisions about you in future, you will have the right to query any decisions made and we will provide reasons for the decisions as far as reasonably possible.
- 5.5 You may refuse to provide us with your Information in which case it is likely that we will not be able to provide you with a relevant service or would have to terminate our business relationship. The supply of certain items of Information especially those collected to comply with regulation, is legally mandatory.
- 5.6 We may further Process your Information if it is compatible with the purpose for which it was collected, for instance to:
- Evaluate your application form or mandate;
  - Evaluate your current and future needs and to suggest further services to you;
  - Evaluate and improve the effectiveness of our services and offerings;
  - Process your marketing preferences (where you have unsubscribed from certain direct marketing communications, keeping a record of your information and request to ensure that we do not send such direct marketing to you again);
  - For operational purposes, e.g. to conclude offers to lease and / or lease agreements;
  - Verify your identity for security purposes;

<b>Privacy Statement</b>		<b>CBRE   EXCELLERATE</b>	
Document Number:	EFM-Com-Pol-00018	Revision Number:	02
Revision Date:	1 June 2025	Pages:	Page 8 of 13
Process Owner:	Thini Ngonyama	Process Sponsor:	Compliance

- Meet legal and regulatory requirements or industry codes to which we may be subject, for example comply with a lawful request for information received from a local or foreign law enforcement agency, court, government, or tax collection agency;
- Use in connection with legal proceedings;
- Conduct our internal audit (including security) functions which allow us to monitor our Systems and Processes. This protects us and you from fraud, identity theft and unauthorised access;
- Conduct statistical and any operational, marketing, auditing, legal and record-keeping requirements;
- Detect and prevent any fraud and money laundering and/or in the interest of security and crime prevention (which includes ongoing due diligence and sanction screening against any sanction list we may determine in our sole discretion);
- Assess and resolve any complaint;
- Perform any risk analysis or for purposes of risk management to you or our business in general;
- Trace your contact information through a tracing agent if you are uncontactable and/or to comply with any regulation or conduct standard relating to unclaimed assets; and
- Prevent or control the spread of any disease.

## 6. HOW DO WE COLLECT YOUR INFORMATION?

- 6.1 Directly from the Data Subject: We will not collect your Information without your consent, except where it is required or permitted by law. We collect most of the Information we Process directly from the Data Subject or an authorised representative of the Data Subject, for example when an application form, offer to lease, or broker mandate is completed.
- 6.2 From third party sources: We also collect or Process Information we obtain from third party sources or sources in the public domain. This may include, but is not limited to:
- subsidiaries within CBRE Excellerate;
  - client due diligence tools, and through identity verification and bank verification processes;
  - sanction screening tools (which may include any sanction list we may determine in our sole discretion);
  - collection of Information by requesting information on source of funds;
  - credit and fraud checks;
  - consumer credit information as defined in the National Credit Act, Act No. 34 of 2005 from registered credit
  - bureaux;
  - tracing agents; and
  - Information as required for the purposes of forensic investigations of whatsoever nature.
- 6.3 During the course of our relationship with a Data Subject and in the course of performing services to a Data Subject, we may obtain financial information from Data Subjects. (Examples is where we invested on behalf of that Data Subject, such as the value of the investment with such product provider or where we need to pay salaries in terms of the employment agreements).



<b>Privacy Statement</b>		<b>CBRE   EXCELLERATE</b>	
Document Number:	EFM-Com-Pol-00018	Revision Number:	02
Revision Date:	1 June 2025	Pages:	Page 9 of 13
Process Owner:	Thini Ngonyama	Process Sponsor:	Compliance

## 7. WHO RECEIVES YOUR INFORMATION?

- 7.1 The services we provide are of such a nature that it is often necessary that Information needs to be shared with or transferred to third parties in order to perform our services to clients. This may be implicit in the service or because you requested us to transfer the Information to the third party. We also need to transfer Information to third parties from time to time for legal or regulatory reasons. We may disclose your Information to third parties for reasons set out in this Privacy Statement or where it is not unlawful to do so.
- 7.2 We may, depending on the type of service, transfer Information to: (i) internal and /or external auditors; (ii) regulators (including but not limited to the Estate Agency Affairs Board (or its successor the Property Practitioners Regulatory Authority); (iii) South African Revenue Services; (iv) Financial Intelligence Centre; (v) attorneys or external legal advisors; (vi) forensic investigation services (internal or external); (vii) service providers providing administrative support services or accounting services to either yourself or to us. We will ensure that such third parties are restricted by obligations of confidentiality to only use the information for the required purpose and that they will apply strict security measures to the Information we share with them.
- 7.3 We will also share Information for the purpose of client due diligence undertaken in compliance with anti- money laundering legislation. We may share this Information within CBRE Excellerate for purposes of the client due diligence processes in compliance with anti-money laundering legislation to establish whether a Data Subject exists and has been verified by other entities within CBRE Excellerate.

## 8. THIRD PARTY COUNTRY TRANSFER

- 8.1 This Privacy Statement applies to all entities within CBRE Excellerate. Your information will primarily be Processed in South Africa, however there are instances where it will be Processed outside of the Republic of South Africa.
- 8.2 In some instances, we may enter Information into our Systems and the systems of our service providers and/or Operators that may use technology or services outside South Africa. Your Information may also be Processed for cloud storage purposes, through the use of any of our websites, as well as transferred or processed outside of the Republic of South Africa
- 8.3 Recipients of your information may be situated in countries which do not have data protection and privacy laws similar to South Africa. We will, however, use all reasonable endeavours to ensure that the contracts entered into with such third parties contain the necessary appropriate safeguards if Information is Processed outside South Africa or rely on other legally permitted safeguards.

## 9. MARKETING

- 9.1 We may contact you from time to time to inform you of similar services to the ones you are contracted for and that we think you may be interested in. We may also provide you with newsletters and market insights as part of our value-added client experience.

<b>Privacy Statement</b>		<b>CBRE   EXCELLERATE</b>	
Document Number:	EFM-Com-Pol-00018	Revision Number:	02
Revision Date:	1 June 2025	Pages:	Page 10 of 13
Process Owner:	Thini Ngonyama	Process Sponsor:	Compliance

- 9.2 We share Information with affiliates in CBRE Excellerate (subject to applicable law and your indicated marketing preferences) so that they may offer you, their services.
- 9.3 You may object to us Processing your information for marketing purposes. You can unsubscribe from direct marketing by following the steps set out in the direct marketing you received or contacting the relevant contact centre or client relationship manager, as the case may be for the product or service.

## 10. HOW LONG DO WE RETAIN YOUR INFORMATION?

- 10.1 We generally only keep your Information on our records for as long as we need it to provide you with services and to meet legal requirements related to record-keeping.
- 10.2 We will keep your Information for as long as:
- the law requires us to keep it;
  - a contract we have with you requires us to keep it;
  - you have consented to us keeping it;
  - we reasonably require it to achieve purposes set out in our contract with you or this Privacy Statement policy; and
  - we require it for our lawful business purposes.
- 10.3 We may also keep your Information for historical, statistical or research purposes if appropriate safeguards are in place. We may keep your Information for longer if there is litigation or an investigation, or any tax or regulatory query.
- 10.4 If we have to keep information for longer periods than set out above (for example if it cannot be safely destroyed), we will only Process it for purposes of storage or for purposes of proof. We will also restrict access and Processing of such information.

## 11. SECURITY BREACHES

- 11.1 In the event of a Security Compromise where your Information has been accessed or acquired by an unauthorised person, we will notify you directly as soon possible as provided for in PoPIA.

## 12. YOUR RIGHTS AS A DATA SUBJECT

- 12.1 12.1. You have the right to have your Information Processed in accordance with the conditions for the lawful Processing of Information as set out in PoPIA. You also have the rights as set out below which we need to make you aware of.

### Right of Access

- 12.2 In terms of section 23 of PoPIA, you are entitled to request us to:

<b>Privacy Statement</b>		<b>CBRE   EXCELLERATE</b>	
Document Number:	EFM-Com-Pol-00018	Revision Number:	02
Revision Date:	1 June 2025	Pages:	Page 11 of 13
Process Owner:	Thini Ngonyama	Process Sponsor:	Compliance

- confirm, free of charge, whether or not we hold Information about you; and
- provide a record or a description of the Information we hold, including information about the identity of all the third parties, or categories of third parties who have, or have had, access to the Information.

12.3 You will need to provide us with adequate proof of identity before we respond to a request. If you request a record, we will respond within a reasonable time. We may charge the fee under applicable law for providing copies of records to you.

#### **Right to request correction or deletion**

- 12.4 You may request us, in terms of section 24 of PoPIA, to correct or delete Information in our possession or under our control that is inaccurate, irrelevant, excessive, out of date, incomplete, misleading, or obtained unlawfully. You may also request us to destroy or delete a record of Information about you that we are no longer authorised to retain.
- 12.5 We will as soon as reasonably practicable correct, destroy or delete, as the case may be – unless we are required or entitled under applicable laws to keep the information and inform you that we have done so.
- 12.6 If we do not believe that the information requires correction, we will provide you with credible evidence in support of the information. If we cannot reach an agreement with you, you may request us to attach to the information we hold the request for correction so that it can be read together.

#### **Right to object to Processing**

- 12.7 Where we Process your information to protect your legitimate interest or to pursue the legitimate interest of a third party to whom the information is supplied or our own legitimate interest, you may object at any time to the Processing of your Information for these purposes, on reasonable grounds relating to your situation, unless applicable law provides for such Processing.
- 12.8 You may also object at any time to the Processing of your Information for purposes of direct marketing or the receipt of direct marketing through unsolicited electronic communication.

#### **Remedies for Data Subjects**

- 12.9 If you have any questions or wish to complain about the Processing of your Information, or if you wish to exercise any of your rights as a Data Subject, you can contact the relevant Chief Information Officer, Entity Information Officers and/or Deputy Information Officers at [Olynda.Nyamanhindi@cbreexcellerate.com](mailto:Olynda.Nyamanhindi@cbreexcellerate.com)
- 12.10 You also have the right to complain to the Information Regulator as set out below.
- 12.11 For additional information relating to your rights as a Data Subject, please refer to the CBRE Excellerate PAIA Manual.

<b>Privacy Statement</b>		<b>CBRE   EXCELLERATE</b>	
Document Number:	EFM-Com-Pol-00018	Revision Number:	02
Revision Date:	1 June 2025	Pages:	Page 12 of 13
Process Owner:	Thini Ngonyama	Process Sponsor:	Compliance

## 13. THE INFORMATION REGULATOR

- 13.1 You may complain to the Information Regulator. Any person may submit a complaint to the Information Regulator in the prescribed manner and form alleging interference with the protection of the Information of a Data Subject. A Data Subject may also submit a complaint in respect of a determination of an adjudicator.

Any enquiries regarding this guide and its contents must be directed to:

### The INFORMATION REGULATOR

JD House, 27 Siemens Street  
Braamfontein  
Johannesburg  
2017  
P O Box 31533, Braamfontein, Johannesburg, 2017

Specific email addresses have been set up by the Information Regulator for the purposes as outlined below:	
<b>General enquiries:</b>	<a href="mailto:enquiries@inforegulator.org.za">enquiries@inforegulator.org.za</a>
<b>Complaints</b> (complete PoPIA/PAIA form 5, which is available on the Website of the Information Regulator) – <ul style="list-style-type: none"> <li>○ If your PAIA request has been denied or there is no response from a private body for access to records, you may use this email address to lodge a complaint:</li> <li>○</li> <li>○ If you feel that your Information has been violated, you may use this e-mail address to lodge a complaint:</li> </ul>	<a href="mailto:PAIAComplaints@inforegulator.org.za">PAIAComplaints@inforegulator.org.za</a>
The Website address for the Information Regulator is as follows:	
<a href="https://www.justice.gov.za/infoereg/">https://www.justice.gov.za/infoereg/</a>	

## 14. UPDATES TO THIS PRIVACY STATEMENT

- 14.1 This Privacy Statement is dated as of **June 2025**. We may update the Privacy Statement from time to time. The current Privacy Statement will be available on our website or available upon request from our office. Please check our website on a regular basis.