

PAIA Manual

Document Control

Field	Value
Approval	v1.1 approved at the Board meeting of 1 August 2025.
Effective Date	01 August 2023
Revised Date	July 2026
Version	1.2
Owner	Information Officer

Overview

This manual is published in terms of section 51 of the Promotion of Access to Information Act 2 of 2000 ("PAIA" or "the Act") for AdviceTech (Pty) Ltd, a private body. It tells a requester how to ask for access to records we hold, what to expect from the process, and where to complain if dissatisfied. It follows the Information Regulator's manual template for private bodies. The Act recognises limitations to the right of access, including the reasonable protection of privacy and commercial confidentiality, balanced against other rights in the Bill of Rights.

1. Particulars of the Private Body

(Section 51(1)(a) of the Act)

1. **Name of the body:** AdviceTech (Pty) Ltd
2. **Head of the body:** Peter James Hewett (Managing Director and Information Officer, Registration 6561/2021-2022/IRRTT)
3. **Deputy Information Officer:** Johan Bester
4. **Postal and street address:** Unit 16B, Willowbrook Office Park, Van Hoof Street, Ruimsig, Roodepoort, 1724
5. **Telephone:** +27 10 593 8025
6. **Email:** peter@advicetech.co.za (Information Officer); info@advicetech.co.za (general)
7. **Website:** <https://www.advicetech.co.za/>

2. Guide of the Information Regulator

The Information Regulator (South Africa) has compiled a guide, as contemplated in the Act, in every official language, to assist a person wishing to exercise any right under the Act, including how to access personal information under section 23 of POPIA. The guide is available from the Information Regulator and on its website (English version: https://inforegulator.org.za/wp-content/uploads/2020/07/PAIA-Guide-English_20210905.pdf).

Any enquiries regarding the guide should be directed to:

The Information Regulator (South Africa)

Physical Address: Woodmead North Office Park, 54 Maxwell Drive, Woodmead, Johannesburg, 2191

Telephone Number: 010 023 5200 (Toll free: 0800 017 160)

Email Address: enquiries@inforegulator.org.za

PAIA Complaints: PAIAComplaints@inforegulator.org.za

Website: <https://inforegulator.org.za/>

3. Records Available Without a Request

The following records are automatically available without a PAIA request: material published on the AdviceTech website, including marketing and product information; this PAIA manual; and the AdviceTech public privacy notice (POPIA). All other records require a request under section 6 of this manual. No record is automatically available merely because it exists; equally, no category listed in this manual is automatically refused. Each request is assessed on the Act's procedural requirements and grounds of refusal.

4. Records Available in Terms of Other Legislation

Records are kept in accordance with legislation applicable to AdviceTech's business, including the following. The schedule was recovered from the approved 2023 source manual in July 2026 and revised to the legislation applicable to AdviceTech's actual business as a software company and employer; legislation applicable only to financial services providers was removed. The revised schedule was confirmed on 17 July 2026.

Legislation
Arbitration Act 42 of 1965
Basic Conditions of Employment Act 75 of 1997
Companies Act 71 of 2008
Compensation for Occupational Injuries and Diseases Act 130 of 1993
Copyright Act 98 of 1978
Electronic Communications and Transactions Act 25 of 2002
Employment Equity Act 55 of 1998
Income Tax Act 58 of 1962
Insolvency Act 24 of 1936
Labour Relations Act 66 of 1995
Occupational Health and Safety Act 85 of 1993
Promotion of Access to Information Act 2 of 2000
Protection of Personal Information Act 4 of 2013
Skills Development Act 97 of 1998
Skills Development Levies Act 9 of 1999
Cybercrimes Act 19 of 2020
Tax Administration Act 28 of 2011
Trade Marks Act 194 of 1993
Unemployment Insurance Act 63 of 2001
Unemployment Insurance Contributions Act 4 of 2002
Value-Added Tax Act 89 of 1991

5. Categories of Records Held

AdviceTech holds records in the following categories. A request for any of them is assessed under the Act; access may be refused only on a ground of refusal in Chapter 4 of Part 3 of the Act (including the protection of the privacy of a third party, commercial information of the body or a third party, and legal privilege), and access must be granted where the record falls outside those grounds or the public-interest override in section 70 applies.

Commercial and legal: contracts and agreements; company records of historical significance; meeting minutes; shareholder records; property leases; trademarks; insurance records; directors' resolutions; correspondence.

Financial: year-end results; financial analysis and reports; budgets; tax and levy records.

Human resources: employee personal information; employment history, skills and qualifications; training and development records; health and safety records; remuneration records; contracts; employment equity records.

Marketing and operations: advertising materials; supplier contracts; product and pricing records.

Client platform records: records processed on the AdviceTech platform as operator for financial services clients. These are controlled by the client concerned as responsible party; a requester seeking access to such records should in the first instance approach that financial services business. AdviceTech nevertheless assesses any request it receives under the Act, in consultation with the affected client, since AdviceTech may itself hold a record relevant to a request.

6. Request Procedure

1. Complete the prescribed Form 2 (Request for Access to Record), available from the Information Regulator: <https://inforegulator.org.za/wp-content/uploads/2020/07/InfoRegSA-PAIA-Form02-Reg7.pdf>, or from AdviceTech on request.
2. Submit the completed form to the Information Officer at the postal, street or email address in section 1, identifying the right the requester seeks to exercise or protect and explaining why the record is required for that purpose.
3. Provide proof of identity, and proof of authority where the request is made on behalf of another person.
4. Pay the prescribed request fee where applicable, and any access fee determined under the Act and its regulations before access is given (fee structure: <https://inforegulator.org.za/paia-fees-structure-2/>).
5. AdviceTech will decide the request within 30 days of receipt, extendable once by up to 30 days where the Act permits, and will notify the requester of the decision in writing, including reasons for any refusal and the remedies available.

7. Remedies

There is no internal appeal against a decision of a private body. A requester dissatisfied with a decision, or with a failure to respond, may lodge a complaint with the Information Regulator on Form 5 (<https://infoeregulator.org.za/wp-content/uploads/2020/07/InfoRegSA-PAIA-Form05-Reg10-1.pdf>) within 180 days, or apply to a court with jurisdiction for appropriate relief.

8. Processing of Personal Information (POPIA)

AdviceTech's public privacy notice describes the purposes of processing, the categories of personal information and data subjects, recipients, cross-border transfers, security measures and data-subject rights, as required by the Regulator's manual template. It is available on the AdviceTech website and forms part of this manual by reference.

9. Availability of this Manual

This manual is available on the AdviceTech website and for inspection at the principal place of business in section 1 during ordinary business hours. It is reviewed at least annually within the governance review window in the Policy Governance Annexure.

10. Document History

Version	Date	Summary of Change
1.1	August 2025	Approved version.
1.2	July 2026	Owner assigned. Independent-review accuracy pass (July 2026); superseded South African Human Rights Commission guide section replaced with the Information Regulator and its current contact details, per the PAIA amendments. Record categories restated with assessment under the Act's grounds of refusal instead of implied automatic refusal, and operator-held client records routed to the responsible party (s5); prescribed Form 2 linked at the Information Regulator's stable address, replacing the personal SharePoint link, with identity, fees and extension rules stated (s6);



		Form 5 complaint and court remedies added (s7); POPIA processing section cross-referenced to the public privacy notice (s8); availability stated (s9); duplicate section numbering from the source corrected. Operator-held records wording corrected so that requests received by AdviceTech are assessed under the Act in consultation with the client rather than merely redirected (s5). Finalisation answers (17 July 2026): revised legislation schedule, including the Cybercrimes Act and Tax Administration Act, confirmed as drafted (s4).
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