

# **Chartered Wealth Solutions (Pty) Ltd Manual**



## **Act 2 of 2000, The Promotion of Access to Information**

Prepared in accordance with Section 51 of the Promotion of  
Access to Information Act No. 2 of 2000

**Effective Date: 1 March 2019**

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- 1. Part I: Particulars of the Private Body -**  
**(Information required under section 51(1)(a) of the Act):**
- a. Name of the Body  
Chartered Wealth Solutions (Pty) Ltd
  - b. Head of the Body (Information Officer)  
Caroline Wilson
  - c. Postal Address  
PO Box 55560, Northlands, 2116
  - d. Street Address  
25 Rudd Road, Illovo, 2196
  - e. Telephone Number  
011 502 2800
  - f. Fax Number  
086 566 2033
  - g. Web address  
[www.charteredwealth.co.za](http://www.charteredwealth.co.za)
  - h. Contact Details of Information Officer
    - i. e-mail: [caroline@charteredwealth.co.za](mailto:caroline@charteredwealth.co.za)
    - ii. Phone 011 502 2800
    - iii. Fax: 086 566 2033

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**2. Part II - Description and Access to the Guide –**

(Information required under section 51(1)(b) of the Act):

- a. Section 51(1)(b) of the Act refer to the guide as described in section 10, if available, and how to access it.
- b. The Human Rights Commission must, within 18 months after the commencement of Section 10 of the Act, compile a guide in each official language. The guide must contain such information as may reasonably be required by a person who wishes to exercise any right contemplated in the Promotion of Access to Information Act, 2 of 2002.
- c. The regulations regarding the Promotion of Access to Information published under Government Notice No. R187 of 15<sup>th</sup> February 2002 set forth how the Human Right Commission should make the guide available.

**3. Part III - Voluntary Disclosure and Automatic Availability of Certain Records -**

(Copy of notice, if any, required under section 51(1)(c) of the Act):

- a. Not applicable.
- b. Automatically available Chartered Wealth Solutions (Pty) Ltd  
Internet Website – [www.charteredwealth.co.za](http://www.charteredwealth.co.za)

**4. Part IV - Records available in accordance with any other legislation –**

(Information required under section 51(1)(d) of the Act):

Legislation (Select Acts applicable to your company and tick in the corresponding block)	Tick
1. Administration of Estates Act, No. 66 of 1965	x
2. Arbitration Act No. 42 of 1965	x
3. Basic Conditions of Employment No. 75 of 1997	✓
4. Companies Act No. 61 of 1973	✓
5. Compensation for Occupational Injuries and Health Diseases Act	✓

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No.130 of 1993	
6. Consumer Affairs (Unfair Business Practices) Act No. 71 of 1988	x
7. Copyright Act No. 98 of 1978	x
8. Credit Agreements Act No. 75 of 1980	x
9. Currency and Exchanges Act No. 9 of 1933	x
10. Debtor Collectors Act No. 114 of 1998	x
11. Employment Equity Act No. 55 of 1998	✓
12. Finance Act No. 35 of 2000	x
13. Financial Services Board Act No. 97 of 1990	✓
14. Financial Relations Act No. 65 of 1976	x
15. Harmful Business Practices Act No. 23 of 1999	x
16. Income Tax Act No. 95 of 1967	✓
17. Insolvency Act No. 24 of 1936	x
18. Insurance Act No 27 of 1943	✓
19. Intellectual Property Laws Amendments Act No. 38 of 1997	x
20. Labour Relations Act No. 66 of 1995	✓
21. Long Term Insurance Act No. 52 of 1998	✓
22. Medical Schemes Act No. 131 of 1998	x
23. Occupational Health & Safety Act No. 85 of 1993	✓
24. Pension Funds Act No. 24 of 1956	✓
25. Post Office Act No. 44 of 1958	x
26. Protection of Businesses Act No. 99 of 1978	x
27. Regional Services Councils Act No. 109 of 1985	x
28. SA Reserve Bank Act No. 90 of 1989	x
29. Short Term Insurance Act No. 53 of 1998	x
30. Skills Development Levies Act No. 9 of 1999	✓
31. Skills Development Act No. 97 of 1998	✓
32. Stamp Duties Act No. 77 of 1968	x
33. Stock Exchange Control Act No. 1 of 1985	x
34. Tax on Retirement Funds Act No. 38 of 1996	x
35. Trade Marks Act No. 194 of 1993	x
36. Unemployment Contributions Act No. 4 of 2002	✓
37. Unemployment Insurance Act No. 63 of 2001	✓
38. Usury Act No 73 of 1968	x
39. Value Added Tax Act No. 89 of 1991	✓

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**5. Part V - Access to Information**

(Information required under section 51(1)(e) of the Act):

5.1 Methods of Access to Manual

- a. Government Gazette to be published
- b. Human Rights Commission – a copy will be made available to the Commission
- c. Chartered Wealth Solutions (Pty) Ltd Web Page - [www.charteredwealth.co.za](http://www.charteredwealth.co.za)
  - i. The Chartered Wealth Solutions (Pty) Ltd Web Page is accessible to anyone who has access to the Internet.

5.2 Description of Records

The Chartered Wealth Solutions Web Page consists of the following categories:

- Home
- About us
- Our process
- Wealth
- Testimonials
- Media
- Contact
- Link to *RetireSuccessfully.co.za*
- Industry recognition
- Retirement workshops and talks
- Can you afford to retire?
- Life planning client login
- Balance test

Other Record Categories –

- ii. Commercial and Legal
  1. Contracts and Agreements
  2. Company Confidential – Historical significance
  3. Meeting Minutes
  4. Shareholders
  5. Property Leases and Agreements
  6. Trademark

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7. Insurance
8. Resolutions – Directors
9. Correspondence

iii. Financial

1. Financial Year-end Results
2. Financial Analysis and Reports
3. Budgets
4. Tax and Levies

iv. Human Resources

1. Employees Personnel Information
2. Employees History (skills and experience)
3. Educational Background
4. Training and Development
5. Health
6. Salaries and Wages
7. Contracts and Agreements
8. Employment Equity

v. Marketing

1. Advertising
2. Contracts with Suppliers
3. Product Ranges and Pricing

vi. Health & Safety

1. Policies
2. Accidents and Incidents Reports