

TAXLEX TRUST-EXECUTOR SERVICES (PTY) LTD – FSP NO – 55208

ACCESS TO INFORMATION MANUAL (PRIVATE BODY)

PREPARED IN TERMS OF SECTION 51 OF THE PROMOTIONOF ACCESS TO INFORMATION ACT 2 OF 2000

DATE OF COMPILATION: 09/09/2026
DATE OF REVISION: 09/09/2027

1. PURPOSE OF THE MANUAL IN TERMS OF PAIA

The purpose of this Manual is to assist people wishing to access information in terms of the PAIA from **TAXLEX TRUST-EXECUTOR SERVICES (PTY) LTD – FSP NO – 55208.**

2. REQUEST FOR ACCESS TO INFORMATION

In the event that a person or entity requires access to information as contemplated in the Act, the requester must contact **AMELIA ST LEGER DENNY** in terms of section 25(2) states that:

(2) If the request for access is granted, the notice in terms of subsection (1)(b) must state—

a) **the access** fee (if any) to be paid upon access;

b) the form in which access will be given; and

c) that the requester may lodge an internal appeal or an application with a court, as the case may be, against the access fee to be paid or the form of access 15 granted, and the procedure (including the period) for lodging the internal appeal or application, as the case may be.

(3) If the request for access is refused, the notice in terms of subsection (1 *)(b)* must—

a) state adequate reasons for the refusal, including the provisions of this Act relied upon;

b) exclude, from such reasons, any reference to the content of the record; and

c) state that the requester may lodge an internal appeal or an application with a court, asthe case may be, against the refusal of the request, and the procedure (including the period) for lodging the internal appeal or application, as the case may be.

3. BACKGROUND OF TAXLEX TRUST-EXECUTOR SERVICES (PTY) LTD

Taxlex Trust-Executor Services (Pty) Ltd conducts business as a Long Term and Short Term Insurance Broker. We are an Authorized Service Provider in terms of the Financial Advisory & Intermediary Service Act. Our FSP licence number is – **55208.**

4. FSP DETAILS

TAXLEX TRUST-EXECUTOR SERVICES (PTY) LTD
Unit 4, Waterkloof Forum Building
374 Milner Street
Waterkloof
0181

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374 Milner Street
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(T) 012 346 6333

Key Individuals – **Carl David Coetzee**
Directors – **Carl David Coetzee & Frederick Jacobus Marais**
Shareholders – **Carl David Coetzee**

5. DETAILS OF THE INFORMATION OFFICER

Name: **Amelia St Leger Denny**
Tel: **012 346 6333**
Email: carlc@taxlex.co.za

6. SECTION 51 (1) (d)

Records (as amended) that are available in terms of other legislation are as follows:

- Electronic Communications and Transactions Act 25 of 2002
- Financial Advisory and Intermediary Services Act no 37 of 2002
- Financial Intelligence Centre Act 38 of 2001
- Income Tax Act 58 of 1962
- Insurance Act 27 of 1943
- Long Term Insurance Act 52 of 1998
- Prevention of Organised Crime Act 121 of 1998
- Short Term Insurance Act 53 of 1998
- The Financial Intelligence Centre Act 38 of 2001
- The National Credit Act 34 of 2005

7. SECTION 51 (1) (e)

The following records may be requested:

- Advice Records
- Customer Due Diligence documents
- Accounting records
- Personnel Records
- Sales and Marketing
- Statutory Company records
- Client Databases
- Internal Phone lists
- Policies & Procedures
- Minutes of Meetings
- Administrative information

8. REQUESTING PROCEDURE

A person who wants access to the records must complete the necessary request form, available from the information officer, and the completed form must be sent to *carlc@taxlex.co.za* and marked for the attention of the information officer.

The requester must indicate which form of access is required and identify the right that is sought to be exercised or protected and provide an explanation of which the requested record is required for the exercise or protection of that right. Proof of the capacity in which the requester is requesting the information should be attached.

9. AVAILABILITY OF THE MANUAL

This manual is available on our website and for inspection by the general public upon request during office hours and there is no charge for viewing the manual at our offices. Copies of the manual may be made available subject to the prescribed fees.

10. FEES

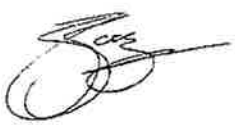
A requester who seeks access to a record containing personal information about thatrequester is not required to pay the request fees. Any other requester who is not a personal requester must pay the required fee:

- A fee will be required by the information officer before further processing of therequest in terms of S54 of the Act
- A requester fee of R50 should be paid, this amount will be refunded should therequest for access be refused
- A portion of the access fee (not more than one third) may be required before the request is considered
- The requester may lodge an application with a court against the payment of therequest fee in terms of S54(3)(b) of the Act
- The head may withhold a record until the requester has paid the applicable fees

11. DETAILS OF THE SOUTH AFRICAN HUMAN RIGHTS COMMISSION

Any queries with regard to this manual should be directed to:

The South African Human Rights Commission
PAIA Unit
Research and Documentation Department
Private Bag 2700
Houghton
2041
Phone: 011 484 8300 **Fax: 011 484 0582**
Email: PAIA@sahrc.org.za **Website: www.sahrc.org.za**

	PREPARDED BY:	**APPROVED BY:**
Name:	Amelia St Leger Denny	Carl David Coetzee
Date:	January 2026	January 2026
Signature:	Type text here 	
Version:	**1.1**	******