

# Privacy

## POLICY

### **Our Commitment**

The Canadian Institute of Chartered Business Valuators (the “Institute”) is committed to protecting the privacy of personal information collected from its Members, Fellows, Life Members (collectively “Members”), Registered Students, and others, and to ensuring such information is used only for the purposes for which it was collected. Personal information is information about an identifiable individual, but does not include the individual’s name, business title, business address or business telephone number, and such other information not deemed to be personal information under applicable privacy laws.

### **Consent, Collection and Use**

The Institute identifies the purposes for collecting personal information at or before the time it is collected. The Institute will not collect, use or disclose your personal information without your informed consent, unless required or permitted to do so by law. Personal information such as your age, home telephone number, email address, date of birth, education, name of your current employer, and work experience may be collected by the Institute. Such information may be used:

- to provide services to its Members, Registered Students, and others who have requested that the Institute provide services;
- to provide to Members and Registered Students contact information concerning other Institute Members;
- to communicate with Members and Registered Students regarding Institute products, services or activities; and
- to respond to enquiries.

From time to time the Institute may share personal information, such as contact information, with third party vendors, suppliers, and service providers responsible for administering activities and programs and distributing materials that may reasonably be likely to interest Institute Members and Registered Students. In such instances, the Institute will use contractual or other means to ensure such third parties provide a comparable level of protection over your personal information while the information is being processed by such third party. Personal information may also be used or disclosed as otherwise permitted or required by law.

### **Limitations on Use and Disclosure**

The Institute will only use and/or disclose personal information in accordance with the purpose for which it was collected, and as set forth herein, unless subsequently consented to, or when required or permitted by law.

The Institute may disclose affiliation status and designation upon enquiry from the public for the limited purpose of informing the public as to whether an individual is a Member or Registered Student of the Institute and in good standing.

### **Safeguarding Your Personal Information**

The Institute has undertaken a comprehensive review of practices to ensure proper safeguards for personal information in its custody and control, and has implemented physical, organizational, contractual, and technological security measures to protect such information from loss, theft, unauthorized access, disclosure, copying, use or modification, both in hard-copy and on-line. Only staff whose duties require access to personal information are granted such access, and only to the extent necessary. Staff and volunteers are accountable for ensuring this policy is followed at all times.

Except as otherwise permitted or required by law, personal information is retained for so long as is reasonably necessary to fulfil the purposes for which it was collected, at which point it is deleted, destroyed, returned or otherwise anonymized.

### **Individual Access and Accuracy**

Individuals from whom personal information is collected may access their personal information at any time, and may challenge the accuracy and completeness of the information and have it amended as appropriate. Members and Registered Students may update information at any time by accessing their profile online on the Institute website at [www.cicbv.ca](http://www.cicbv.ca).

### **Your Use of Personal Information Collected by the Institute**

Members and Registered Students are provided access to Members' name, employer or business name, contact address, telephone number, and fax and email address to facilitate professional communications between and among Members and Registered Students. Members are encouraged to provide the Institute with business contact particulars if they do not wish for their residential information to be accessible to other Members or to Registered Students.

The Institute requires that Members or Registered Students use this information in a private and secure manner. Members and Registered Students shall not use any such information (including personal information) for any commercial purpose, including but not limited to, mass mailings, advertising and headhunting. A Member or Registered Student shall not provide any such information to any person for any purpose, unless otherwise consented to by the individual to whom such information is attributed.

### **Web Site Governed by this Privacy Policy**

The web site that is governed by the provisions and practices stated in this privacy policy is [www.cicbv.ca](http://www.cicbv.ca). The Institute's web site may contain links to other third party sites that are not governed by this privacy policy. Although the Institute endeavours to only link to sites with high privacy standards, its privacy policy will no longer apply once you leave the Institute's web site. The Institute is not responsible for the privacy practices employed by third party web sites.

### **Updating this Privacy Policy**

Any changes to the Institute's privacy policy and information handling practices will be acknowledged in this policy in a timely manner. The Institute may add, modify or remove portions of this policy when it feels that it is appropriate to do so. For substantive changes, the Institute will make reasonable efforts to give notice of any changes to this policy. The Institute may provide notifications of substantive changes prominently on its website and/or send an email or other form of communication notifying its Members and/or a Registered Students of substantive changes to its privacy policy. Substantive changes to the policy will be binding thirty (30) days after such changes have been introduced and for which notification of such substantive changes

has been made. The date when this policy was most recently amended is noted at the bottom of the policy.

**Governing Law and Dispute Resolution**

This privacy policy, and the handling of personal information, is governed solely by the laws of the Province of Ontario, Canada and the federal laws of Canada applicable therein, to the exclusion of any rules of private international law or conflict of laws which would lead to the application of any other laws.

Members and Registered Students may reside outside of Canada and, as set out in this privacy policy, the Institute may perform activities outside of Canada through third parties. As a result, personal information may be processed, used, stored or accessed in other countries and may be subject to the laws of those countries. For example, information may be disclosed in response to valid demands or requests from government authorities, courts, or law enforcement in these countries. In particular, information that is processed, used, stored or accessed in the United States may be subject to the Patriot Act and applicable anti-terrorism legislation, together with other legislation applicable within the United States. The Institute has an arrangement with a third party service provider whereby personal information is used and stored in the State of Oregon, USA.

Any claim or cause of action you may have arising from, connected with, or relating to this privacy policy or the Institute's handling of your personal information, or any related matters must be commenced within six months after the claim or cause of action arises, after which time the claim or cause of action is forever barred, regardless of any statute or law to the contrary.

**Questions or Concerns**

Privacy practices for the Institute's various activities are reviewed regularly and updated as necessary. Any questions or concerns regarding this policy or its implementation should be directed to the Privacy Officer, 277 Wellington Street West, Suite 710, Toronto, Ontario M5V 3H2.

Board of Directors  
March 8, 2012