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## **PMAC Privacy Policy**

*This Privacy Policy explains how the Portfolio Management Association of Canada ("PMAC") handles personal information, including on our website at [www.portfoliomanagement.org](http://www.portfoliomanagement.org) (the "Website"). Please read this Policy carefully before using the Website.*

*PMAC may from time to time, collect, use and disclose personal information about our users. By using the PMAC Website, you confirm your acceptance of this Policy and agree that PMAC may collect, use and disclose personal information as described in this Policy and as permitted or required by law. We respect the privacy of our users and aim to protect the personal information of individuals who visit the Website.*

*"Personal Information" includes information about an identifiable individual as contemplated under the Personal Information Protection and Electronic Documents Act.*

*PMAC does not engage in the practice of selling, providing or trading personal information to third parties for marketing, promotional or other purposes. PMAC makes reasonable efforts to ensure that the personal information it collects is limited to what is necessary for its intended use. PMAC may from time to time make any necessary revisions to its Policy to reflect changes in legal or regulatory obligations or changes in the manner in which we collect, use or deal with personal information.*

### **Identifying Purpose**

PMAC may collect, use and/or disclose personal information about you from time to time, including information about you such as your name, mailing address, telephone number, e-mail address, when you register for one of our events or when you create a member login/ID to become a Website user. Personal information collected by PMAC is used for one or more of the following purposes: to verify your identity; to provide you with information about PMAC services and events; to provide you with compliance and/or regulatory communications; and to improve the content of our Website and/or our services.

In addition to the personal information you may provide to us, the Website uses technology that allows the PMAC to collect certain technical information including the date and time the Website is accessed, the Internet address of the website from which the Website is linked and the Website pages read and images viewed. This information is solely intended for analytical use and system administration purposes and to improve the Website and may be disclosed to other persons and permanently retained for future use.

From time to time, PMAC may place information on your computer to allow PMAC to identify you. This information is commonly known as "cookies". By showing how and when PMAC visitors use the Website, this information can help PMAC continue to improve the Website. If you do not wish to receive cookies, or want to be notified of when they are placed, you may set your web browser to do so, if your browser so permits. NOTE: If cookies are turned off, you may not be able to view certain parts of the Website that may enhance your visit.



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### **Emails and Ebulletins/ Newsletters**

If you contact PMAC by email or otherwise indicate that you would like to receive email from PMAC, then from time to time, we may send you email or other communications containing information about PMAC and/or the Website. At any time you may ask us to stop sending you email, ebulletins, newsletters and other information. To withdraw from our communications, send your request to [info@portfoliomanagement.org](mailto:info@portfoliomanagement.org).

### **Affiliate Members, Third Parties and Other Service Providers**

By using the Website, you accept that your personal information, gained through registration or otherwise in connection with your use of the Website and its services, may be transferred to PMAC's Affiliate Members and/or third parties for the purposes of registration at our events or to agents who perform tasks related to the Website and its services. Where personal information is provided to a third party such third party will prohibit any use or disclosure of such personal information, except as necessary to perform the work agreed to with PMAC.

### **Limitations on Use**

PMAC will limit its collection of personal information to that information which is necessary for the purposes identified in this Policy. PMAC will retain your personal information only for so long as is necessary to fulfill the purposes identified. Please also note that if PMAC is compelled by law, court order or other judicial process to disclose any of your personal information to a court, administrative body, government agency or other third party, PMAC will attempt to give you prior notice using the contact information you provided. You hereby authorize PMAC to disclose any information about you for any of the above stated purposes.

### **Safeguards**

PMAC will use its best efforts to protect your personal information through safeguards appropriate to the sensitivity of the information to protect your personal information against loss or theft, as well as unauthorized access, disclosure, copying, use or modification. Access to your personal information will be limited to staff and/or those persons tasked with the duties set out above. Despite our best efforts, PMAC cannot guarantee that your personal information will not be used or disclosed in ways not otherwise described in this Policy.

### **Other Websites**

For your convenience, the Website may include links or references to other websites or resources and businesses operated by other persons. PMAC does not endorse and has no responsibility, liability or control over any other websites or their collection, use or disclosure of your personal information. We encourage you to read the privacy policies or statements of those other websites to learn how they collect, use or disclose your personal information.

### **Accuracy and Reliance**

PMAC's Website, and the content found on this Website, are provided as a service to Members and for educational and informational purposes only. Although the Website content is believed to be accurate, complete, and up to date when posted, we cannot



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guarantee that the Website content is or will remain accurate, complete or current, or that the Website content will be available without interruption. Furthermore, the Website Content is not intended to provide investment, financial, accounting, legal, tax or other professional advice and should not be relied upon for such advice. We recommend that you seek advice from a qualified professional advisor before acting on any information or other content appearing on this Website or any website to which it may be linked.

PMAC may modify or withdraw access to, or the content on the Website, at any time, with or without notice.

### **Comments and Questions**

To provide feedback or comments on our management of personal information please contact us at [info@portfoliomanagement.org](mailto:info@portfoliomanagement.org).