

## **Privacy Policy**

Chaleur Tax Consulting Professional Corporation Chartered Professional Accountants (“Chaleur Tax Consulting”, “I”, or “me”) has a responsibility to protect personal information regarding its clients (“clients” or “you”), partners and employees. The following privacy policy explains how Chaleur Tax Consulting collects and uses personal data and describes the rights you have with respect to your personal data. My firm believes protecting your privacy is important and has developed a privacy policy designed to meet the needs of its clients and employees and conform to the Personal Information Protection and Electronic Documents Act (“PIPEDA”).

The Code of Professional Conduct and related Council Interpretations of the Chartered Professional Accountants of Canada require that practitioners maintain the confidentiality of client and former client information, as well as the confidentiality of firm information, except in rare and very specific circumstances.

The Code of Professional Conduct of the Chartered Professional Accountants of Canada also require that partners and staff not use confidential information for personal advantage, for the advantage of a third party or to the disadvantage of a client, former client or the firm, unless consent has been obtained from the client, former client or the Firm.

## **Personal Information**

Personal information includes any factual or subjective information, recorded or not, about an identifiable individual.

This includes information in any form, examples include, but are not limited to:

- Age, name, email address, phone number, income, or ethnic origin;
- Opinions, assessments, comments, or disciplinary actions; and
- Employee files, credit records, loan records, medical records, existence of a dispute with a client, intentions (for example, to acquire goods or services, or change jobs).

Chaleur Tax Consulting collects personal information for the following reasons:

- To provide and maintain the products or services that you have engaged us to undertake;
- To better understand your needs and make recommendations accordingly;
- To contact you by email, telephone call, SMS or other equivalent forms of electronic communication;
- To manage our business with you and your account; and
- To meet legal, professional and regulatory requirements.

We will not use your personal information for any other reason without your consent and will only share your information with third parties to assist in completing the above uses. Any third party’s use must adhere to our privacy policies or be allowed by the legislation. Examples would be an outside payroll service, legal counsel retained by you, a collection agency, a law enforcement agency or emergency services.

## **Cookies**

We may from time to time use certain information commonly called cookies on your computer to save you time as a Visitor and User of our website. We do not collect personal information in this fashion. If you do not wish this convenience, your browser will likely enable you to reject cookies.

**Accountability**

Chaleur Tax Consulting is accountable for all personal information in its possession, including any personal information disclosed to third parties for processing or other administrative functions.

Chaleur Tax Consulting has an appointed Privacy Officer, who is part of senior management, to be accountable for the firm's privacy policies and enforcement. I have also been trained on privacy issues.

Chaleur Tax Consulting's Privacy Officer can be contact at:

Privacy Officer  
Chaleur Tax Consulting  
Suite 126, 1150 Memorial Dr NW  
Calgary, Alberta T2N 5E1  
403.880.0683

**Purposes**

Chaleur Tax Consulting shall identify the purpose for which personal information is collected before collecting it from you.

**Consent**

Chaleur Tax Consulting shall obtain consent (through the engagement letter or other means) for all personal information collected, used or disclosed by Chaleur Tax Consulting, unless such collection or use is inappropriate, or permitted by law.

**Limitation of Collection, Use, Disclosure and Retention**

Personal information collected shall be limited to information that is necessary for the purposes identified by Chaleur Tax Consulting and be collected by fair and lawful means.

Personal information collected by Chaleur Tax Consulting, shall not be used or disclosed for purposes other than those for which it was collected, except with the consent of the individual or as required or permitted by law. Personal information shall be retained only as long as necessary for the fulfillment of those purposes and to comply with our legal obligations.

**Accuracy**

Personal information shall be as accurate, complete, and up to date as is necessary to fulfill the purposes for which it is to be used. We will use our best efforts to keep your information up to date.

**Safeguards**

Chaleur Tax Consulting shall safeguard your information against unauthorized access, disclosure, copying, use or modification. The security of your personal data is important to me, however it must be noted that no form of transmission over the Internet or electronic storage is 100% secure. Chaleur Tax Consulting employs commercially acceptable means to protect your personal data, but we cannot fully guarantee total security.

**Openness**

Chaleur Tax Consulting shall make information available, to its clients and employees, about the policies and practices that apply to the management of their information.

**Individual Access**

Upon request, an individual shall be informed of the existence, use and disclosure of their information, and shall be given access to it. An individual will be given reasonable access to their information and

may correct any personal information if its accuracy and completeness is challenged and found to be deficient.

### **Challenging Compliance**

An individual shall be able to challenge compliance with the above privacy principles. Chaleur Tax Consulting shall investigate all complaints in a timely manner.

### **Minor Children**

Chaleur Tax Consulting does not collect personal information from anyone under the age of 13 without verifiable prior consent from a parent or guardian. If you believe your child has provided me with personal information without your consent, please contact me.

### **Disclaimer**

Chaleur Tax Consulting provides the [chaleurconsulting.com](http://chaleurconsulting.com) website as a service to our clients and the general public.

Chaleur Tax Consulting is not responsible for, and expressly disclaims all liability for, damages of any kind arising out of use, reference to, or reliance on any information contained within the site. While the information contained within the site is periodically updated, no guarantee is given that the information provided in this website is correct, complete, and up to date.

Although the Chaleur Tax Consulting Web site may include links providing direct access to other Internet resources, including websites, Chaleur Tax Consulting is not responsible for the accuracy or content of information contained in these sites.

Links from Chaleur Tax Consulting to third-party sites do not constitute an endorsement by Chaleur Tax Consulting.

Please be advised that this Privacy Policy may change periodically and therefore I recommend reviewing it periodically. Changes are effective when posted.