

Privacy and Confidentiality

Privacy Policy

Gail J Broadbent Professional Corporation understands that you value your privacy and that you wish to have your personal information kept secure. For these reasons we place a high priority on the security of information we hold. We have developed this policy to inform you about how we manage your personal information and maintain its integrity and security in accordance with the Canadian Personal Information Protection and Electronic Documents Act (PIPEDA). We will safeguard and keep confidential any information collected relating to clients that is required to be kept confidential and safeguarded in accordance with governing laws, regulatory authorities, Rules of Professional Conduct/ Code of Ethics, Firm policy and specific client instructions or agreements.

We may review and update this Privacy Policy from time to time to take account of new laws and technology. All personal information held by us will be governed by the most up-to-date version of this Privacy Policy posted on our website.

Types of Information Collected and Held

Confidential information includes, but is not limited to:

- Name or other unique identifiers;
- Date of Birth
- Addresses, phone, fax, e-mail;
- Age, sex, marital status, personal relationships;
- Family and close relationships
- Occupation and employment details
- Income amounts and sources
- Expenses incurred and sources
- Lifestyle information including medical;
- Buying and consumption tendencies;
- Financial or business information of any nature;
- Proprietary trade information, secrets, processes, products or market knowledge;
- Government or other regulatory information identification numbers or similar identities; and
- Electronic documents, data and communications.
- Banking information including but not limited to bank statements, loans, credit card statements, investment statements,
- Insurance documents
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We may collect personal information directly from you when you:

- Complete a form, manually or electronically
- Register in a mobile app
- Over the phone verbally, text, fax, face book, email, electronic chats, mobile applications
- Provide manual and/or scanned copies of documents
- Provide feedback
- Authorize our firm with Canada Revenue Agency or any other body
- Where we are required or authorized by law to do so

Collection and Retention of Information

We collect and retain personal information primarily to record appropriate details for the engagement, service or order you have placed with us and also that we may:

- Administer our client relationship
- Provide you with information, products or services you have requested or we feel may be of interest to you
- Acquire goods from us or use our services
- Request information about us, our products and services
- Provide feedback
- Fill in a form
- Where we are required or authorized by law to do so

You consent to us using your personal information in those ways and for sending you information about our products, services and special offers.

Personal and client information shall be retained only as long as necessary for the fulfilment of professional, regulatory and legal requirements.

Access and Use of Information

Client information and any personal information obtained shall be used or disclosed only for the purpose collected, except with the consent of the individual or entity or as required by law.

You have the right to request access to you personal information and seek correction of same. You may do so by contacting us.

Security of Your Personal Information

We are committed to maintaining the security and confidentiality of the data and information you provide us and will take all reasonable precautions to protect your personal information with the aid of our stringent security procedures and technology. Any personal information you provide to us will be collected and held by us or on our behalf. Access to and use of personal information within Gail J Broadbent Professional Corporation is appropriately limited to prevent misuse or unlawful disclosure of the information. Where the personal information is no longer required by us or by law, we delete the information. We will not otherwise disclose your personal information unless the disclosure:

- Is in accordance with this Privacy and Confidentiality Policy or any agreement you enter with us
- Is required by law
- Is authorized by law
- Is made with your consent

Quality of Your Personal Information

We aim to ensure that your personal information is accurate, complete, and up to date. To assist us in this, the responsibility remains with you to provide true, accurate, current and complete information about yourself as request and properly update the information to us to keep it true, accurate, current, and complete.

Please contact us if you believe the information is inaccurate or incomplete, and we will use all reasonable efforts to correct the information.

Contact Us About Privacy

If you have any questions or would like further information about our privacy and information handling practices, please contact us:

Email: admin@gailbroadbentcpa.com

Phone: 780-623-3735

Fax: 780-623-3745

Mail: Box 1992, Lac La Biche, AB T0A 2C0

Complaints Handling

If you are concerned in the manner we have dealt with your personal information and/or if you believe there is potential breach of your privacy and/or confidentiality, you may contact us using the contact information above and provide the details in writing of your complaint. We will investigate any complaint promptly and will contact you for further information if required. You will be contacted with our resolution on the matter.