



October 24, 23

Tailored Consulting Services (“Company,” “we,” or “us”) respects your privacy and is committed to protecting it through this Privacy Policy.

Our privacy commitment is based on the ten principles contained in the Personal Information Protection and Electronic Documents Act (Canada) (“PIPEDA”).

Personal Health Information

The services offered by Tailored Consulting Services are not required to be offered by a regulated health care practitioner, therefore we will never ask for personal health information when accessing our website or services.

This Privacy Policy governs your access to and use of www.tailoredconsultingservices.ca, including any content, functionality and services offered on or through Tailored Consulting Services (the “Website”), whether as a guest or as a registered user. This policy applies to Personal Information we collect on the Website and in email, text, forms or other electronic messages between you and the Website.

Please read the Privacy Policy carefully before you start to use the Website. By using the Website, you accept and agree to be bound and abide by the Privacy Policy. If you do not want to agree to the Privacy Policy, you must not access or use the Website.

Personal Information

Personal Information under PIPEDA is any information about an identifiable individual, but does not include the name, title, business address or telephone number of an employee of an organization.

Why do we collect Personal Information?

Tailored Consulting Services
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We collect Personal Information in order to respond to any request made or initiated by you. In addition, we distribute publications and offer educational opportunities concerning governance, operations, fund development and community engagement, which we provide as a service to you and others in our community.

The Company collects your information in order to record and support your participation in the activities you select. If you register to download a PDF or resources, sign up for our newsletter, and/or purchase a product from us, we collect your information. We use this information to track your preferences and to keep you informed about the products and services you have selected to receive and any related products and/or services.

How do we collect personal information?

We collect personal information only by lawful and fair means, and only collect personal information that is reasonably necessary for the legitimate purposes identified and for which consent has been obtained.

Information You Provide To Us. The Website may provide various places for users to provide information. We collect information that users provide by filling out forms on the Website, communicating with us via contact forms, responding to surveys, search queries on our search feature, providing comments or other feedback, and providing information when ordering a product or service via the Website.

We use information you provide to us to deliver the requested product and/or service, to improve our overall performance, and to provide you with offers, promotions, and information.

Information We Collect Through Automatic Tracking Technology

As you navigate through our Website, we may use automatic data collection technologies including Google Analytics to collect certain information about your equipment, browsing actions, and patterns. This will generally include information about your location, your traffic pattern through our Website, and any communications between your computer and our Website. Among other

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things, we may collect data about the type of computer you use, your Internet connection, your IP address, your operating system, and your browser type.

The information we collect automatically is used for statistical data and will not include personal information. We use this data to improve our Website and our service offerings. To the extent that you voluntarily provide personal information to us, our systems will associate the automatically collected information with your personal information.

Use of Cookies And Pixels

Similar to other commercial websites, our Website utilizes a standard technology called “cookies” and server logs to collect information about how our site is used. Information gathered through cookies and server logs may include the date and time of visits, the pages viewed, time spent at our site, and websites visited just before and just after our own, as well as your IP address.

The Company reserves the right to use technological equivalents of cookies, including social media pixels. These pixels allow social media sites to track visitors to outside websites so as to tailor advertising messages users see while visiting that social media website. The Company reserves the right to use these pixels in compliance with the policies of the various social media sites.

Third Party Use Of Cookies

Some content or applications, including advertisements, on the Website may be served by third-parties, including advertisers, ad networks and servers, content providers, and application providers. These third parties may use cookies alone or in conjunction with web beacons or other tracking technologies to collect information about you when you use our website. The information they collect may be associated with your personal information or they may collect information, including personal information, about your online activities over time and across different websites and other online services. They may use this information to provide you with interest-based (behavioural) advertising or other targeted content.

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Email Information

If you choose to correspond with us through email, we may retain the content of your email messages together with your email address and our responses. We provide the same protections for these electronic communications that we employ in the maintenance of information received online, mail, and telephone. This also applies when you register for our website, sign up through any of our forms using your email address or make a purchase on this site. For further information see the email policies below.

Email Policies

We are committed to keeping your e-mail address confidential. We do not sell, rent, or lease our subscription lists to third parties, and will not disclose your email address to any third parties except as required by law.

All e-mails sent by us will be in compliance with the Canadian Anti-Spam Legislation ("CASL"), including clearly stating whom the e-mail is from and provide clear information on how to contact the sender. In addition, all e-mail messages will also contain concise information on how to remove yourself from our mailing list so that you receive no further e-mail communication from us. Users who no longer wish to receive our newsletter or promotional materials may opt-out of receiving these communications by clicking on the unsubscribe link in the e-mail.

Collection from Third Parties

How do we use your information?

We use personal information for purposes of presenting our Website and its contents to you, providing you with information, providing you with offers for products and services, providing you with information about your subscriptions and products, carrying out any contract between you and the Company, administering our business activities, providing customer service, and making available other items and services to our customers and prospective customers.

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From time-to-time, we may use the information you provide to us to make you offers to purchase products and services provided by third parties in exchange for a commission to be paid to us by such third parties. Should you opt to take part in such promotions, the third parties will receive your information.

From time-to-time, we may use the information you provide to us to display advertisements to you that are tailored to your personal characteristics, interests, and activities.

Disclosure of Information

As a general rule, we do not sell, rent, lease or otherwise transfer any information collected either automatically or through your voluntary action.

We may disclose your personal information to our subsidiaries, affiliates, and service providers for the sole purpose of providing our services directly to you.

We may disclose your personal information to a third party, including a lawyer or collection agency, when necessary to enforce our terms of service or any other agreement between you and the Company.

We may provide your information to any successor or assign in the event of a merger, divestiture, restructuring, reorganization, dissolution, or other sale or transfer of some or all of the Company's assets and/or business.

We may disclose information when legally compelled to do so when we, in good faith, believe that the law requires it, or for the protection of our legal rights, or when compelled by a court or other governmental entity to do so.

Security Measures

We use appropriate security measures to protect against loss, theft, unauthorized access, disclosure, use or modification of personal information. Such measures will vary depending on the sensitivity, amount, format, nature and storage of the personal information and will involve, as applicable, physical, organizational and electronic security measures, including premises security, restricted file access, technological safeguards including security

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software and firewalls to prevent unauthorized computer access, and password and security policies. In communicating with us, you should be aware that e-mail is not a fully secure medium.

Updating Information and Correcting Errors

Since we use your personal information to provide goods or services to you, it is important that the information be accurate and up-to-date. If any of your information changes, is inaccurate or incomplete, please inform us so that we can make any necessary changes.

Access to Personal Information

We will respond promptly to any request for access to your personal information and will advise you of the cost, if any, prior to the retrieval of such records or information. We will not respond to requests for access to personal information that are frivolous, vexatious or repetitious. In certain circumstances, we may be unable to provide access to some or all of the personal information that we hold about you.

Visitor GDPR Rights

If you are visiting this Website from within the European Union (“EU”) or the UK, you are entitled to certain information and have certain rights under the General Data Protection Regulation of the EU (and corresponding legislation of the UK) which include the following:

- We will retain any information you choose to provide to us until the earlier of: (a) you asking us to delete the information, (b) our decision to cease using our existing data providers, or (c) We decide that the value in retaining the data is outweighed by the costs of retaining it.
- You have the right to request access to your data that we store and the rights to either rectify or erase your personal data.
- You have the right to seek restrictions on the processing of your data.
- You have the right to object to the processing of your data and the right to the portability of your data.

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- To the extent that you provided consent to the our processing of your personal data, you have the right to withdraw that consent at any time, without affecting the lawfulness of processing based upon consent that occurred prior to your withdrawal of consent.

You have the right to lodge a complaint with a supervisory authority that has jurisdiction over issues related to the General Data Protection Regulation. We require only the information that is reasonably required to enter into a contract with you. We will not require you to provide consent for any unnecessary processing as a condition of entering into a contract with us.

For more information about your rights as a website visitor from the EU and the GDPR, please see the European Commission website here - https://ec.europa.eu/commission/priorities/justice-and-fundamental-rights/data-protection/2018-reform-eu-data-protection-rules_en.

Privacy Policy Changes

We may change our Privacy Policy from time to time without notice. Please check our Website for the most up-to-date version of the policy.

Questions, concerns or requests for access

If you have any questions or concerns regarding our Privacy Policy, please contact us as follows:

Jamie Matthews, Privacy Officer
Owner and Strategist
Tailored Consulting Services

Effective Date of Policy: October 24, 2023

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