



Data Privacy Policy Template

CFA Society Victoria Privacy Policy

Last Updated: November 21, 2025

CFA Society Victoria is a not-for-profit professional body for investment professionals with its registered address at PO Box 49-747 Princess Avenue, Victoria, BC V8T 1K5

This privacy policy ("Privacy Policy"):

1. Describes how we gather and protect individually identifiable information ("Personal Information").
2. How we use, process, transfer, and share Personal Information.
3. Describes your personal data privacy rights.

This Privacy Policy applies to Personal Information that we collect through any means, including the CFA Society Victoria website, digital advertising, events and conferences, employment processes and direct interactions with CFA Society Victoria staff. When we refer to Personal Information in this Policy, we are also referencing "personal data" as it is defined under the Personal Information Protection Act (PIPA)

The Personal Information We Collect

Listed below are the classes of Personal Information that we collect. Please note, however, we do not collect all this Personal Information from everyone.

1. Contact Data (name; personal contact information (phone, email address, physical address))
2. CFA Institute ID
3. Individual's status in CFA's programs
4. Work location
5. Job/position title

Personal Data Protection Principles

We adhere to general data privacy principles when collecting and processing personal data that require us to:

- (A) Collect and use personal data fairly and only for lawful and specified purposes related to our legitimate business objectives.
- (B) Limit our personal data collection to what is adequate, relevant, and not excessive for the intended purpose.
- (C) Notify individuals about our personal data processing practices in a clear and transparent manner
- (D) Ensure the accuracy of the personal data we collect, hold, and use.
- (E) Retain personal data only for the time needed to fulfil the established purpose.
- (F) Respect data subjects' rights.
- (G) Secure the personal data we hold.

Data Security

CFA Society Victoria are responsible for protecting the personal data we hold. We take reasonable and appropriate security measures against unlawful or unauthorized processing of personal data and against the accidental loss of,

or damage to, personal data. We exercise particular care in protecting sensitive personal data from loss and unauthorized access, use, or disclosure.

CFA Society Victoria follow all procedures and technologies we put in place to maintain the security of all personal data from the point of collection to the point of destruction. We only transfer personal data to third-party service providers who agree to comply with the required policies and procedures and who agree to put adequate measures in place, if requested.

CFA Society Victoria must maintain data security by protecting the confidentiality, integrity, and availability of the personal data, defined as follows:

- (A) Confidentiality means that only people who have a need to know and are authorized to use the data can access it.
- (B) Integrity means that personal data is accurate and suitable for the purpose for which it is processed.
- (C) Availability means that authorized users are able to access the data when they need it for authorized purposes.

Data Subjects' rights and requests

You have rights when it comes to how we handle their personal data. *[Please check your jurisdiction]* These rights but may include rights to:

- (A) Request access to their personal data that we hold.
- (B) Prevent our use of their personal data for direct marketing purposes.
- (C) Ask us to delete personal data or correct inaccurate data.
- (D) Prevent processing that is likely to cause damage or distress to the data subject or anyone else.

You must make a written request to access, correct, or delete the personal data we hold about you. Please send an email to info@cfavictoria.com