

## Carroll Thatcher Planning Group Privacy Policy

Privacy of personal information is an important principle to Carroll Thatcher Planning Group. We are committed to collecting, using and disclosing personal information responsibly. This document describes our privacy policies.

### The Personal Information Protection and Electronic Documents Act

As of 1 January 2004, Canadians are protected by the Personal Information Protection and Electronic Documents Act, which sets out ground rules for how private sector organizations may collect, use or disclose personal information in the course of commercial activities.

### What is Personal Information?

Personal information is information about an identifiable individual. Personal information includes information that relates to their personal characteristics (e.g., gender, age, income, home address or phone number, ethnic background, family status), their health (e.g., health history, health conditions, health services received by them) or their activities and views (e.g., religion, politics, opinions expressed by an individual, an opinion or evaluation of an individual). Personal information is to be contrasted with business information (e.g., an individual's business address and telephone number), which is not protected by privacy legislation.

### Our Policy:

- We shall identify the purpose for which personal information is collected before or at the time we collect the personal information.
- We shall obtain the Individual's consent for the collection, use or disclosure of personal information, except where the law provides an exemption.
- We shall limit the personal information we collect to only that which is necessary for the purposes identified.
- We shall only use or disclose personal information for the purposes for which it was collected, unless an individual has otherwise consented or when it is required or permitted by law. Personal information shall be retained only as long as necessary for the fulfillment of those purposes.
- We shall keep personal information as accurate, complete and up-to-date as may be necessary to fulfill the purposes for which it is to be used.

- We shall protect personal information using security safeguards that are appropriate to the sensitivity level of the personal information received.
- On written request to our Privacy Officer, an individual will be informed of the existence, use and disclosure of their personal information that is under our control, and may be given access to that personal information as required and permitted by law. Individuals are entitled to challenge the accuracy and completeness of that personal information and request that it be amended, if appropriate.

Any questions relating our privacy policy may be addressed to our Privacy Officer:

Meredith Thatcher  
Carroll Thatcher Planning Group  
Suite 202 – 1339 Wellington Street, Ottawa, ON K1Y 3B8  
Phone: (613) 729-2646; Fax: (613) 761-1609; [solutions@thatcherplanning.com](mailto:solutions@thatcherplanning.com)

For more general inquiries, the Information and Privacy Commissioner of Canada oversees the administration of the privacy legislation in the private sector. The Commissioner also acts as a kind of ombudsman for privacy disputes. The Information and Privacy Commissioner can be reached at:

112 Kent Street, Ottawa, Ontario K1A 1H3  
Phone: (613) 995-8210; Toll-free: 1-800-282-1376  
Fax: (613) 947-6850; [www.privcom.gc.ca](http://www.privcom.gc.ca)