

## **General Privacy Policy**

Burkett & Co. continues to be committed to maintaining the accuracy, confidentiality, and security of your personal and financial information. As part of this commitment, we have established Ten Privacy Principles to govern our actions as they relate to the use of client information. We invite you to review our principles, which are built upon the values set by the Canadian Standard's Association in their Model Code for the Protection of Personal Information and Canada's Personal Information Protection and Electronic Documents Act.

**1. Accountability:** Burkett & Co. is responsible for maintaining and protecting client information under our control. In fulfilling this mandate, we are required to designate an individual/individuals who is/are accountable for our Company's compliance with the Ten Privacy Principles.

**2. Identifying Purposes:** The purposes for which client information is collected shall be identified before, or at the time, the information is collected.

**3. Consent:** The knowledge and consent of the client is required for the collection, use, or disclosure of client information except where required or permitted by law.

**4. Limiting Collection:** The client information collected must be limited to those details necessary for the purposes identified by Burkett & Co. Information must be collected by fair and lawful means.

**5. Limiting Use, Disclosure and Retention:** Client information may only be used or disclosed for the purpose for which it was collected, unless the client has otherwise consented or when it is required or permitted by law. In order to provide effective and efficient service, you agree that we may disclose any client information to your other financial advisors. This includes, but is not limited to, your investment advisors, bankers, lawyers, insurance agents, and financial planners. Periodically, we may engage contractors to whom client information may also need to be disclosed. We require that all such contractors conform to our privacy principles. Client information may only be retained for the period of time required to fulfill the purpose for which it was collected.

**6. Accuracy:** Client information must be maintained in as accurate, complete, and up-to-date form as necessary to fulfill the purposes for which it is to be used.

**7. Safeguarding Client Information:** Client information must be protected by security safeguards that are appropriate to the sensitivity level of the information.

**8. Openness:** Burkett & Co. is required to make information available to clients concerning the policies and practices that apply to the management of their information.

**9. Client Access:** Upon request, a client shall be informed of the existence, use, and disclosure of their information.

**10. Handling Client Complaints and Suggestions:** Clients may direct any questions or inquiries regarding the privacy principles outlined above or about our practices to:

[accountants@burkett.ca](mailto:accountants@burkett.ca)