



ADVISORY SERVICES

## WG Advisory Services Web Portal Privacy Policy

Effective as of January 1<sup>st</sup>, 2020

This Privacy Policy describes WG Advisory Services Web Portal policies and procedures on the collection, use and disclosure of your corporate and personal information. Your privacy is very important to us. This policy applies to the use of the encase™ Web Portal (the "**Portal**") and all the related products, software, services, and websites (collectively referred to as "**Services**") provided by WG ADVISORY SERVICES (the "**Company**"). This policy does not apply to practices of companies that are not owned or controlled by the Company, or to people who are not employed or managed by the Company, with the exception of partners of the Company who may be involved in the creation or processing of information in the Portal. If you have any questions about this Policy, please feel free to contact us at [privacy@wgadvisory.ca](mailto:privacy@wgadvisory.ca).

### Portal User Acceptable Use Policy

As a registered user of the Portal, I acknowledge that I have read and agree to follow the site use conditions of the portal. This includes (but is not limited to):

- I will NOT share my login name or password with others under any circumstance;
- I will NOT share confidential or intellectual property pertaining to the Portal without written permission from WG Advisory Services;
- I commit to re-setting my password within 3 days of initial login;
- Content will not divulge or contain sensitive or confidential information which is not intended for the audience which has access to the Portal;
- I will inform WG Advisory Services or registered partner, if I no longer require access to the portal for any reason.
- The technologies, methodologies and processes in the Portal are protected by intellectual property rights. I will not copy, reproduce or disseminate any proprietary technology, methodology, or processes that are contained in or included as part of the Portal.

### Data Retention

We will retain corporate information and any personal information we process on behalf of our clients for as long as your account is active or is needed to provide you with services. If you wish to cancel your account or request that we no longer use your information to provide you with services, please contact [encase@wgadvisory.ca](mailto:encase@wgadvisory.ca). We will retain and use your information as necessary to comply with our legal obligations, resolve disputes, and enforce our agreements.

### Confidentiality and Legal Privilege

Any and all information we gather or hold about you is confidential whether or not you are a current or past client of the Company. This overriding duty of confidentiality is subject to restrictions imposed by law and when we believe that disclosure is necessary to protect our rights and/or to comply with a judicial proceeding, court order, or legal process.

We do not disclose your private information except in the limited circumstances as described herein. The Company processes client information only for the purposes for which it was collected, and we take reasonable steps to ensure that the information we process is secure, accurate, complete, and current.

We do not rent, sell, or share any information gathered in except when we have your permission. We may disclose your information if we believe that it is reasonably necessary to do so to comply with a law,



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regulation or legal request; to protect the safety of any person; to address fraud, security or technical issues; or to protect the Company's rights or property.

### **Information Collection and Use**

We collect some personal information such as your user ID, account password and email address when you register or update your Portal account. When you register with the Portal and sign into our service, you are not anonymous to us.

When you send email or other communication to us, we may retain those communications in order to process your inquiries, respond to your requests, and improve our services.

### **Changes to this Policy**

We may update and/or change this policy from time to time. The most current version of the policy will govern our use of your information. By continuing to access or use the Services after those changes become effective, you agree to be bound by the revised Privacy Policy.