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**Personal Information Protection and Electronic Documents Act**

At A Taxing Situation, we are committed to providing our clients with exceptional service. As providing this service involves the collection, use and disclosure of some personal information about our clients, protecting their personal information is one of our highest priorities.

While we have always respected our client’s privacy and safeguarded their personal information, we have strengthened our commitment to protecting personal information as a result of Canada’s *Personal Information Protection and Electronic Documents Act* (PIPEDA).

We will inform our clients of why and how we collect, use and disclose their personal information, obtain their consent where required, and only handle their personal information in a manner that a reasonable person would consider appropriate in the circumstances.

This Personal Information Protection Policy, in compliance with PIPEDA, outlines the principles and practices we will follow in protecting clients’ personal information. Our privacy commitment includes ensuring the accuracy, confidentiality, and security of our clients’ personal information and allowing our clients’ to request access to, and correction of, their personal information.

##### Definitions

***Personal Information –***means information about an identifiable individual such as but not limited to: Contact Information, Name, Age, Date of Birth, Social Insurance Number, Marital Status, Income, Employment information, Medical History and Education

***Contact information*** – means information that would enable an individual to be contacted at their home or a place of business and includes name, position name or title, telephone number, address or emai.

***Privacy Officer*** – means the individual designated responsibility for ensuring that A Taxing Situation complies with this policy and PIPEDA.

##### Policy 1 – Collecting Personal Information

1.1 The purposes for collecting personal information are for the completing of your Income Tax Return and will only be used for this purpose.

1.2 We will only collect client information that is necessary to fulfill this purpose.

**Policy 2 – Consent**

2.1 We will obtain client consent to collect, use or disclose personal information.

2.2 Consent can be provided or it can be implied where the purpose for collecting using or disclosing the personal information would be considered obvious and the client voluntarily provides personal information for that purpose.

2.3 Clients can withhold or withdraw their consent for A Taxing Situation to use their personal information. At that point our relationship will terminate.

2.4 We will not collect, use or disclose personal information without the clients’ knowledge or consent.

Policy 3 – Using and Disclosing Personal Information

3.1 We will only use or disclose client personal information where necessary to fulfill the purposes identified at the time of collection or for the purpose of communicating directly with the client.

3.2 We will not use or disclose client personal information for any additional purpose unless we obtain consent to do so.

3.3 We will not sell client lists or personal information to other parties.

**Policy 4 – Retaining Personal Information**

4.1 Personal information will be retained for a maximum of 1 year after the termination of our relationship at which time it will be destroyed, except where prohibited by law, so that the client has a reasonable opportunity to request access to it.

4.2 Subject to policy 4.1, we will retain client personal information only as long as necessary to fulfill the identified purposes or a legal or business purpose.

**Policy 5 – Ensuring Accuracy of Personal Information**

5.1 We will make reasonable efforts to ensure that client personal information is accurate and complete.

5.2 Clients may request correction to their personal information in order to ensure its accuracy and completeness. A request to correct personal information must be made in writing and provide sufficient detail to identify the personal information and the correction being sought.

5.3 If the personal information is demonstrated to be inaccurate or incomplete, we will correct the information as required.

**Policy 6 – Securing Personal Information**

6.1 We are committed to ensuring the security of client personal information in order to protect it from unauthorized access, collection, use, disclosure, copying, modification or disposal or similar risks.

6.2 The following security measures will be followed to ensure that client personal information is appropriately protected:

1) All electronic information will only be stored on locally protected hard drives.

2) Any information recorded on paper will be kept under lock and key on our premises.

**3) Electronic correspondence will only be sent to a verified email address and will only be sent or received by a secure web address on our end. Any security issues on the clients end are their responsibility and A Taxing Situation bears no responsibility once it has left our secure server to your email address. We will only send sensitive material as a reply to a message sent to us.**

4) **While we make every effort to ensure your privacy, there are certain inherent risks associated with electronic communication. We assume no responsibility for issues beyond our control.**

6.3 We will use appropriate security measures when destroying clients’ personal information such as the shredding and recycling of paper.

6.4 We will continually review and update our security policies and controls as technology changes to ensure ongoing personal information security.

**Policy 7 – Providing Clients Access to Personal Information**

7.1 Clients have a right to access their personal information, subject to availability.

7.2 A request to access personal information must be made in writing and provide sufficient detail to identify the personal information being sought

7.3 Upon request, we will also tell clients how we use their personal information and to whom it has been disclosed if applicable.

7.4 We will make the requested information available within 30 business days, or provide written notice of an extension where additional time is required to fulfill the request.

**Policy 8 – Questions and Complaints: The Role of the Privacy Officer or designated individual**

8.1 The Privacy Officer is responsible for ensuring A Taxing Situation’s compliance with this policy and the *PIPEDA.*

8.2 Clients should direct any complaints, concerns or questions regarding A Taxing Situations compliance in writing to the Privacy Officer. If the Privacy Officer is unable to resolve the concern, the client may also write to the Information and Privacy Commissioner of Ontario

Contact information for A Taxing SituationsPrivacy Officer: Rob Katzman, 905-717-2174 rob@ataxingsituation.ca