

# Website Privacy

## PRIVACY INFORMATION

Visitors and clients are assured of our commitment to the safety, security, and confidentiality of personal and portfolio information on this web site. We have taken extensive steps to prevent unauthorized access to this information.

When you become a client securities laws require us to collect personal information, such as your name, address, birth-date, and Social Insurance Number. This means that we must sometimes share information with others (such as outside vendors who provide trading, custody, record keeping, and performance reporting services for your portfolio). These vendors have only transmitted information required by governing provincial securities commissions and other regulatory and government entities.

Our primary goal in collecting personal information is to provide you with a smooth, efficient, and customized experience. This allows us to provide features that meet your needs and customize our service to make your experience easier.

Your account information resides on a secure portion of our Designed Securities (DS) web site. Access is gained through logging in under a unique username and password assigned to you. We require your commitment in this relationship – please keep your username and password secure!

Electronic privacy is a vital element in the ongoing success of the Internet. The information you enter here will be kept in strict confidence and will never be sold or rented.

This privacy statement applies only to our site. Links to other sites will have their own statement of privacy and should be read during your visit.

## Cookies

Like most commercial web sites, you should be aware that we use what is known as “cookie” technology. A cookie is a non-executable piece of data that a web site can send to a user’s browser when it links to that site. By assigning a unique data element to each visitor, the web site can recognize repeat users, track usage patterns, and better serve you when you return to that site. The cookie does not extract personal information about you. Most browsers provide a simple procedure that will enable you to control whether you want to receive cookies by notifying you when a web site is about to deposit a file.

Some of our business partners use cookies on our site. However, we have no access to or control over these cookies.

## Log Files

We use IP addresses to analyze trends, administer the site, track user's movement, and gather broad demographic information for aggregate use. IP addresses are not linked to personally identifiable information.

## Security

This web site takes every precaution to protect users' information. When you submit sensitive information via the website, your information is protected both online and off-line.

When users enter sensitive information online (such as credit card number and/or social security number), they are encrypted and protected with encryption software. [While on a secure page, such as our order form, the lock icon on the bottom of Web browsers such as Microsoft Internet Explorer becomes locked, as opposed to un-locked, or open, when you are just 'surfing.')

While we use encryption to protect sensitive information online, we also do everything in our power to protect information off-line. Access to all of our users' information is restricted in our offices. Only employees who need the information to perform a specific job (for example, our billing clerk or a customer service representative) are granted personally identifiable information. [Our employees must use password-protected screen-savers when they leave their desk. When they return, they must re-enter their password to re-gain access to your information.] Furthermore, all employees are kept up-to-date on our security and privacy practices. Every quarter and any time, new policies are added. Our employees are notified and/or reminded about the importance we place on privacy and what they can do to ensure our customers' information is protected. Finally, the servers that we use to store personally identifiable information are kept in a secure environment.

## Site and Service Updates

We also send the user site and service announcement updates, which contain important information about the service. We communicate with the user to provide requested services and connect with issues relating to their account via e-mail or telephone.

## Correction/Updating Personal Information

If a user's personally identifiable information changes, or if a user no longer desires to use our services, we will endeavour to provide a way to correct, update or remove that user's personal data provided to us.

## **Notification of Changes**

If we decide to change our privacy policy, we will post the last change date so that you are always aware of what information we collect, how we use it, and under what circumstances we disclose it.

If, at any point, we decide to use personally identifiable information in a manner different from that stated at the time it was collected, we will notify users by way of an email. Users will have a choice as to whether or not we use their information in this different manner. We will use information following the privacy policy under which the information was collected.

## **Your Consent**

By using this web site, you consent to the collection and use of your personal information by PensionizeMe Wealth Strategies (PMWS) and PensionizeMe Financial Strategies (PMFS), its subsidiaries, subscribers, affiliates, partners, and associated businesses.