

Privacy Notice

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Privacy Notice At Collection

Introduction

“Citrin Cooperman” is the brand under which Citrin Cooperman & Company, LLP, a licensed independent CPA firm, and Citrin Cooperman Advisors LLC serve clients’ business needs. The two firms operate as separate legal entities in an alternative practice structure. Citrin Cooperman is an independent member of Moore North America, which is itself a regional member of Moore Global Network Limited (MGNL).

This Privacy Notice describes how Citrin Cooperman and its subsidiary entities collect, use, share, sell, disclose, retain, dispose of, and protect Personal Data, as defined by applicable privacy legislation, also referred to as “Personal Data,” when you interact with us as a subscriber, client, prospective client, office visitor, website user, job applicant, employee, contractor, supplier, event attendee, or any other relevant individual, and describes the choices you have relating to your Personal Data and how to exercise such rights.

Applicability

This Privacy Notice applies to any Personal Data you provide to Citrin Cooperman and any Personal Data we collect during your employment, when you apply to a job posting, contact us, visit, or use our website, “www.citrincooperman.com” and all websites linked to this website, when you visit a Citrin Cooperman office, attend a Citrin Cooperman event or seminar, or request a service from us. The Personal Data we collect varies depending on the nature of the services we provide and how you interact with us. To use this site, you do not need to send us any Personal Data.

For purposes of this Privacy Notice, “Personal Information”, also referred to as “Personal Data”, means information that identifies, relates to, describes, is reasonably capable of being associated with, or could reasonably be linked, directly, or indirectly, with a particular consumer, identified individual or household, or any similar term defined in and governed by Applicable Data Protection Laws.

Additionally, “Sensitive Personal Information”, also referred to as “Sensitive Personal Data”, or "Special Categories of Data" is a subset of Personal Data that requires heightened protection. Examples include and are not limited to Information on Children, Background Check Information, Financial Detail Information, Employment Information such as citizenship, Personal Data such as gender, ethnicity, emails or post mail, racial origin, race, political affiliations, religious affiliation or beliefs, call recordings, Government Identifiers such as SSN, Personal Health Information, Contact Information such as physical address or Browsing Information such as precise geolocation (able to identify the location of an individual within 1,850 ft).

At Citrin Cooperman, we value your privacy and are committed to safeguarding your information as part of our ongoing dedication to providing a secure and transparent experience for our users. As a result, we are committed to keeping our Privacy Notice up to date, reflecting any changes in our Personal Data practices or the adoption of new privacy policies. Should you have any questions or concerns about our Privacy Notice or how we process your Personal Data, please do not hesitate to reach out to us.

Your Personal Data

At Citrin Cooperman, we offer a wide range of Assurance, Tax, and Advisory services to meet the business and personal needs of our clients. Given the diversity of our [Service offerings](#), we process broad categories of Personal Data, including Special Categories of Data, Sensitive Personal Information, or Sensitive Data. We use your Personal Data for lawful business purposes, including (i) using only Special Categories of Data, Sensitive Personal Information, or Sensitive Data provided by you with your consent, (ii) performance of a contract, and/or (iii) complying with legal and regulatory obligations.

We also collect and use your Personal Data when you apply for a job to assess your suitability for job opportunities and provide you with personalized experiences. Additionally, we collect and use your Personal Data as an employee to manage the employment relationship, communicate with you, improve the workplace and our services, protect the health and safety of our employees, and comply with legal and regulatory requirements.

We process your Personal Data for the following purposes:

To provide products and services to you

To comply with legal/regulatory requirements

To operate and improve our business

To manage our workforce and provide them with employment, training, compensation, or benefits

For marketing and advertising purposes

To improve the security and performance of our website, network, systems and services

To protect against fraud and abuse

To protect the safety and security of our employees and clients

To communicate with you about our products and services

To operate and understand your use of our website

You may have executed a contract, such as a Master Services Agreement (MSA), Statement of Work (SoW), Engagement Letter or other Agreement, that governs the relationship between you and Citrin Cooperman and the services we provide to you. If there is any conflict between the terms of your agreement with Citrin Cooperman and the terms of this Privacy Notice, the terms of your agreement will prevail.

Type of Personal Data We Collect

We may collect and process the following types of Personal Data:

Data Category (Client Representatives)	Example Personal Identifiers	Purposes for Collection/Use	Shared with Third Parties	Sources of Personal Data
Browsing Information	Browsing time, cookie information, IP address, web beacons, device fingerprinting, imprecise geolocation information, web browsing history, search history, clickstream data, social media activity, ad tracking data, pixels, device unique identifier, browser type and settings, application usage data	<p>We collect and process your Browsing Information for the following purposes:</p> <ul style="list-style-type: none">• To understand your interests and needs.• To improve the performance of our marketing campaigns.• To improve the performance of our website.• To personalize the content and advertising that we show to users.• To prevent fraud and abuse.• To comply with legal requirements.• To improve the security of our website, systems, and services.	Yes	<p>We use third parties to collect Browsing Information on our behalf, to improve the performance of our website and to personalize the content and advertising that we show to you.</p> <p>We may also collect your Browsing Information automatically through our use of cookies and other data collection technologies on our sites.</p>
Contact Information	Name, postal address, phone number, mailing address, email address, physical location	<p>We collect and process your Contact Information for the following purposes:</p> <ul style="list-style-type: none">• To market our products and services.• To send you marketing materials.• To verify your identity.• To identify potential clients.• To communicate with you about our products and services.• To contact you about your account.• To improve our security.• To improve our events.• To invite you to our events or webinars.• To fulfill our contractual obligations to you.• To provide you with customer support.• To process payments.• To comply with legal requirements.• To prevent fraud and abuse.• To improve our products and services.	Yes	Contact Information is collected from you and may also be collected from other third parties you have authorized to provide us with your Personal Data.
Device Information	Device type and operating system, device unique identifier, IP address, audio, video, device fingerprints	<p>We collect and process your Device Information for the following purposes:</p> <ul style="list-style-type: none">• To provide you with our	Yes	<p>Device Information is collected from you, other third parties or subscribers.</p> <p>We may also collect your Device Information automatically through our use of cookies and other data collection</p>

		<p>products and services.</p> <ul style="list-style-type: none"> • To improve our products and services that you have requested. • To protect our systems and networks. • To protect our users. • To comply with legal requirements. • To market our products and services to you. 		technologies on our sites.
Family Information	Parent’s name, dependents, and other household information	<p>We collect and process your Family Information for the following purposes:</p> <ul style="list-style-type: none"> • To provide you with the products and services that you have requested. • To improve our products and services. • To contact your family members in the event of an emergency. 	No	Family Information is collected from you or your representatives you have authorized to provide us with your Personal Data.
Financial Detail Information	Bank account information, bank statements, compensation data, and other financial-related details such as income, investments, benefits, tax status	<p>We collect and process your Financial Detail Information for the following purposes:</p> <ul style="list-style-type: none"> • To process payments. • To verify your identity. • To conduct due diligence. • To protect our interests. • To negotiate acquisitions. • To provide you with the financial products and services that you have requested. • To comply with legal requirements. • To protect against fraud and abuse. 	No	Financial Detail Information is collected from prospective corporate acquisitions, you, or your representatives you have authorized to provide us with your Personal Data.
Government Identifier Information	Driver’s license, national identification number, passport number, social security number, national identity card details	<p>We collect and process your Government Identifier Information for the following purposes:</p> <ul style="list-style-type: none"> • To verify your identity. • To comply with legal requirements. • To prevent fraud and abuse. 	No	Government Identifier Information is collected from you or your representatives you have authorized to provide us with your Personal Data.
Personal Detail Information	Age, gender, date of birth, marital status, nationality, signature	<p>We collect and process your Personal Detail Information for the following purposes:</p> <ul style="list-style-type: none"> • To provide products and services that you have requested. • To provide information that you have requested. • To provide event registration. • To improve our products and services. • To improve our events. • To comply with legal requirements. 	No	Personal Detail Information is collected from you and third parties you have authorized to provide us with your Personal Data.

		<ul style="list-style-type: none"> • To prevent fraud and abuse. • To market our products and services. 		
Personal Health Information	Information related to medical payment, medical claims data, medical history, products, or equipment used, health plan beneficiary, medical treatment	<p>We collect and process your Personal Health Information for the following purposes:</p> <ul style="list-style-type: none"> • To assist in meal planning. • To comply with regulatory requirements. • To prevent fraud and abuse. 	No	Personal Health Information is collected from you or your representatives you have authorized to provide us with your Personal Data.
Professional Experience and Affiliation Information	Professional memberships, qualifications, certifications	<p>We collect and process your Professional Experience and Affiliation Information for the following purposes:</p> <ul style="list-style-type: none"> • To provide you with the products and services that you have requested. • To improve our products and services. • To comply with legal requirements. • To market our products and services to you. • To prevent fraud and abuse. 	No	Professional Experience and Affiliation Information is collected from you, your representatives you have authorized to provide us with your Personal Data, and third parties you have authorized to provide us with your Personal Data.
Special Categories of Personal Data	Genetic, biometric and health data, as well as Personal Data revealing racial and ethnic origin, political opinions, religious or ideological convictions or trade union membership.	<p>We collect and process your Special Categories of Data for the following purposes:</p> <ul style="list-style-type: none"> • To provide you with the products and services you have requested. • To improve our products and services. • To comply with legal requirements such as anti-discrimination laws. • To protect the safety of employees or others. • To prevent fraud and abuse. • With your consent, to market our products and services to you. 	No	Special Categories of Data is collected from you or your representatives you have authorized to provide us with your Personal Data.
Social Media Information	Social media accounts, social media content, social media history, profile information, posts, connections, likes, shares, comments, interactions, behavioral data, technical data	<p>We collect and process your Social Media Information for the following purposes:</p> <ul style="list-style-type: none"> • To market our products and services to you. • To improve our products and services. • To comply with legal requirements. 	Yes	<p>Social Media Information is collected from you, your clients, or your representatives you have authorized to provide us with your Personal Data.</p> <p>We may also collect your Social Media Information from third-party sources, such as social media platforms (if you interact with us through your social media account), cookies and other data collection technologies on our sites.</p>
User Account Information	Account age, account number, email address or username, account password	<p>We collect and process your User Account Information for the following purposes:</p> <ul style="list-style-type: none"> • To create and manage your account. • To provide you with access to our products and 	No	<p>User Account Information is collected from you.</p> <p>We may also collect your User Account Information from third-party payment processors, if used to process your payment for services rendered.</p>

		<div>services.</div> <div><div></div><div>To protect your account from unauthorized access.</div></div> <div><div></div><div>To improve our products and services.</div></div> <div><div></div><div>To comply with legal requirements.</div></div>		
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Data Category (Client Representatives)	Example Personal Identifiers	Purposes for Collection/Use	Shared with Third Parties	Sources of Personal Data
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Browsing Information	Browsing time, cookie information, IP address, web beacons, device fingerprinting, imprecise geolocation information, web browsing history, search history, clickstream data, social media activity, ad tracking data, pixels, device unique identifier, browser type and settings, application usage data	<div>We collect and process your Browsing Information for the following purposes:</div> <div><div></div><div>To understand your interests and needs.</div></div> <div><div></div><div>To improve the performance of our marketing campaigns.</div></div> <div><div></div><div>To improve the performance of our website.</div></div> <div><div></div><div>To personalize the content and advertising that we show to users.</div></div> <div><div></div><div>To prevent fraud and abuse.</div></div> <div><div></div><div>To comply with legal requirements.</div></div> <div><div></div><div>To improve the security of our website, systems, and services.</div></div>	Yes	<div>We use third parties to collect Browsing Information on our behalf, to improve the performance of our website and to personalize the content and advertising that we show to you.</div> <div>We may also collect your Browsing Information automatically through our use of cookies and other data collection technologies on our sites.</div>
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Contact Information	Name, postal address, phone number, mailing address, email address, physical location	<p>We collect and process your Contact Information for the following purposes:</p> <ul style="list-style-type: none"> • To market our products and services. • To send you marketing materials. • To verify your identity. • To identify potential clients. • To communicate with you about our products and services. • To contact you about your account. • To improve our security. • To improve our events. • To invite you to our events or webinars. • To fulfill our contractual obligations to you. • To provide you with customer support. • To process payments. • To comply with legal requirements. • To prevent fraud and abuse. • To improve our products and services. 	Yes	Contact Information is collected from you and may also be collected from other third parties you have authorized to provide us with your Personal Data.
Device Information	Device type and operating system, device unique identifier, IP address, audio, video, device fingerprints	<p>We collect and process your Device Information for the following purposes:</p> <ul style="list-style-type: none"> • To provide you with our products and services. • To improve our products and services that you have requested. • To protect our systems and networks. • To protect our users. • To comply with legal requirements. • To market our products and services to you. 	Yes	<p>Device Information is collected from you, other third parties or subscribers.</p> <p>We may also collect your Device Information automatically through our use of cookies and other data collection technologies on our sites.</p>
Family Information	Parent’s name, dependents, and other household information	<p>We collect and process your Family Information for the following purposes:</p> <ul style="list-style-type: none"> • To provide you with the products and services that you have requested. • To improve our products and services. • To contact your family members in the event of an emergency. 	No	Family Information is collected from you or your representatives you have authorized to provide us with your Personal Data.
Financial Detail Information	Bank account information, bank statements, compensation data, and other financial-related details such as income, investments, benefits, tax status	<p>We collect and process your Financial Detail Information for the following purposes:</p> <ul style="list-style-type: none"> • To process payments. 	No	Financial Detail Information is collected from prospective corporate acquisitions, you, or your representatives you have authorized to provide us with your Personal Data.

		<ul style="list-style-type: none"> • To verify your identity. • To conduct due diligence. • To protect our interests. • To negotiate acquisitions. • To provide you with the financial products and services that you have requested. • To comply with legal requirements. • To protect against fraud and abuse. 		
Government Identifier Information	Driver’s license, national identification number, passport number, social security number, national identity card details	We collect and process your Government Identifier Information for the following purposes: <ul style="list-style-type: none"> • To verify your identity. • To comply with legal requirements. • To prevent fraud and abuse. 	No	Government Identifier Information is collected from you or your representatives you have authorized to provide us with your Personal Data.
Personal Detail Information	Age, gender, date of birth, marital status, nationality, signature	We collect and process your Personal Detail Information for the following purposes: <ul style="list-style-type: none"> • To provide products and services that you have requested. • To provide information that you have requested. • To provide event registration. • To improve our products and services. • To improve our events. • To comply with legal requirements. • To prevent fraud and abuse. • To market our products and services. 	No	Personal Detail Information is collected from you and third parties you have authorized to provide us with your Personal Data.
Personal Health Information	Information related to medical payment, medical claims data, medical history, products, or equipment used, health plan beneficiary, medical treatment	We collect and process your Personal Health Information for the following purposes: <ul style="list-style-type: none"> • To assist in meal planning. • To comply with regulatory requirements. • To prevent fraud and abuse. 	No	Personal Health Information is collected from you or your representatives you have authorized to provide us with your Personal Data.
Professional Experience and Affiliation Information	Professional memberships, qualifications, certifications	We collect and process your Professional Experience and Affiliation Information for the following purposes: <ul style="list-style-type: none"> • To provide you with the products and services that you have requested. • To improve our products and services. • To comply with legal requirements. • To market our products and services to you. 	No	Professional Experience and Affiliation Information is collected from you, your representatives you have authorized to provide us with your Personal Data, and third parties you have authorized to provide us with your Personal Data.

		<ul style="list-style-type: none"> • To prevent fraud and abuse. 		
Special Categories of Personal Data	Genetic, biometric and health data, as well as Personal Data revealing racial and ethnic origin, political opinions, religious or ideological convictions or trade union membership.	<p>We collect and process your Special Categories of Data for the following purposes:</p> <ul style="list-style-type: none"> • To provide you with the products and services you have requested. • To improve our products and services. • To comply with legal requirements such as anti-discrimination laws. • To protect the safety of employees or others. • To prevent fraud and abuse. • With your consent, to market our products and services to you. 	No	Special Categories of Data is collected from you or your representatives you have authorized to provide us with your Personal Data.
Social Media Information	Social media accounts, social media content, social media history, profile information, posts, connections, likes, shares, comments, interactions, behavioral data, technical data	<p>We collect and process your Social Media Information for the following purposes:</p> <ul style="list-style-type: none"> • To market our products and services to you. • To improve our products and services. • To comply with legal requirements. 	Yes	<p>Social Media Information is collected from you, your clients, or your representatives you have authorized to provide us with your Personal Data.</p> <p>We may also collect your Social Media Information from third-party sources, such as social media platforms (if you interact with us through your social media account), cookies and other data collection technologies on our sites.</p>
User Account Information	Account age, account number, email address or username, account password	<p>We collect and process your User Account Information for the following purposes:</p> <ul style="list-style-type: none"> • To create and manage your account. • To provide you with access to our products and services. • To protect your account from unauthorized access. • To improve our products and services. • To comply with legal requirements. 	No	<p>User Account Information is collected from you.</p> <p>We may also collect your User Account Information from third-party payment processors, if used to process your payment for services rendered.</p>

Data Category (Clients)	Example Personal Identifiers	Purposes for Collection/ Use	Shared with Third Parties	Sources of Personal Data
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Authenticating Information	Passwords, PIN, mother’s maiden name	<p>We collect and process your Authenticating Information of clients, employees, and contractors for the following purposes:</p> <ul style="list-style-type: none"> • To authenticate your identity and grant you access to our services or systems. • To prevent fraud and abuse. • To comply with legal requirements, such as those related to financial services or healthcare. • To improve the security of our systems and services. • To improve your customer 	No	Authenticating Information is collected from you or your representatives you have authorized to provide us with your Personal Data.
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Beneficiary Contact Information	Name of beneficiary contact, telephone number of beneficiary contact, address of beneficiary contact, relationship to individual	<p>We collect and process your Beneficiary Contact Information for the following purposes:</p> <ul style="list-style-type: none"> • To contact your beneficiary in the event of your death. • To provide information about benefits to your beneficiary. • To comply with legal requirements, such as those related to employment law or tax law. • To protect the privacy of your beneficiary contact information. 	No	Beneficiary Contact Information is collected from you or your representatives you have authorized to provide us with your Personal Data.
Background Check Information	Criminal history, criminal records, driving citations	<p>We collect and process your Background Check Information for the following purposes:</p> <ul style="list-style-type: none"> • To understand your needs and interests. • To assess your suitability for our products or services. • To comply with legal requirements, such as those related to anti-money laundering or know-your-customer laws. • To prevent fraud and abuse. • To improve our decision-making about marketing and sales. 	No	Background Check Information is collected from you and third parties you have authorized to provide us with your Personal Data.
Browsing Information	Browsing time, cookie information, IP address, web beacons, device fingerprinting, imprecise geolocation information, web browsing history, search history, clickstream data, social media activity, ad tracking data, pixels, device unique identifier, browser type and settings, application usage data	<p>We collect and process your Browsing Information for the following purposes:</p> <ul style="list-style-type: none"> • To understand your interests and needs. • To improve the performance of our marketing campaigns. • To improve the performance of our website. • To personalize the content and advertising that we show to users. • To prevent fraud and abuse. • To comply with legal requirements. • To improve the security of our website, systems, and services. 	Yes	<p>We use third parties to collect Browsing Information on our behalf, to improve the performance of our website and to personalize the content and advertising that we show to you.</p> <p>We may also collect your Browsing Information automatically through our use of cookies and other data collection technologies on our sites.</p>

Children Information	Names of children, age or gender of children, birth date, address of children, activities associated with children	<p>We collect and process Clients’ Children Information only with the consent of a parent or guardian for the following purposes:</p> <ul style="list-style-type: none"> • To perform services and fulfill our contractual obligations to you. • To comply with our legal obligation to protect the privacy of children. 	No	Children Information is collected from you or your representatives you have authorized to provide us with your Personal Data.
Contact Information	Name, postal address, phone number, mailing address, email address, physical location	<p>We collect and process your Contact Information for the following purposes:</p> <ul style="list-style-type: none"> • To market our products and services. • To send you marketing materials. • To verify your identity. • To communicate with you about our products and services. • To contact you about your account. • To improve our security. • To improve our events. • To invite you to our events or webinars. • To fulfill our contractual obligations to you. • To provide you with customer support. • To process payments. • To comply with legal requirements. • To prevent fraud and abuse. • To improve our products and services. 	Yes	Contact Information is collected from you and may also be collected from other third parties you have authorized to provide us with your Personal Data.
Device Information	Device type and operating system, device unique identifier, IP address, audio, video, device fingerprints	<p>We collect and process your Device Information for the following purposes:</p> <ul style="list-style-type: none"> • To provide you with our products and services. • To improve our products and services that you have requested. • To protect our systems and networks. • To protect our users. • To comply with legal requirements. • To market our products and services to you. 	Yes	<p>Device Information is collected from you, other third parties or subscribers.</p> <p>We may also collect your Device Information automatically through our use of cookies and other data collection technologies on our sites.</p>
Emergency Contact Information	Name of emergency contact, contact information of emergency contact, relationship to individual, next of kin	We collect and process your Emergency Contact Information to contact your emergency contact in an emergency.	No	Emergency Contact Information is collected from you or your representatives you have authorized to provide us with your Personal Data.
Family Information	Parent’s name, dependents, and other household information	<p>We collect and process your Family Information for the following purposes:</p> <ul style="list-style-type: none"> • To provide you with the 	No	Family Information is collected from you or your representatives you have authorized to provide us with your Personal Data.

		<p>products and services that you have requested.</p> <ul style="list-style-type: none"> • To improve our products and services. • To contact your family members in the event of an emergency. 		
Financial Detail Information	Bank account information, bank statements, compensation data, and other financial-related details such as income, investments, benefits, tax status	<p>We collect and process your Financial Detail Information for the following purposes:</p> <ul style="list-style-type: none"> • To process payments. • To verify your identity. • To conduct due diligence. • To protect our interests. • To negotiate acquisitions. • To provide you with the financial products and services that you have requested. • To comply with legal requirements. • To protect against fraud and abuse. 	No	Financial Detail Information is collected from prospective corporate acquisitions, you, or your representatives you have authorized to provide us with your Personal Data.
Government Identifier Information	Driver’s license, national identification number, passport number, social security number, national identity card details	<p>We collect and process your Government Identifier Information for the following purposes:</p> <ul style="list-style-type: none"> • To verify your identity. • To comply with legal requirements. • To prevent fraud and abuse. 	No	Government Identifier Information is collected from you or your representatives you have authorized to provide us with your Personal Data.
Personal Detail Information	Age, gender, date of birth, marital status, nationality, signature, image/video, voice/audio recording	<p>We collect and process your Personal Detail Information for the following purposes:</p> <ul style="list-style-type: none"> • To provide products and services that you have requested. • To provide information that you have requested. • To provide event registration. • To improve our products and services. • To improve our events. • To comply with legal requirements. • To prevent fraud and abuse. • To market our products and services. • To provide products and services to you. <ul style="list-style-type: none"> • Event management • For marketing and advertising purposes. 	Yes	Personal Detail Information is collected from you and third parties you have authorized to provide us with your Personal Data.

Personal Health Information	Information related to medical payment, medical claims data, medical history, products, or equipment used, health plan beneficiary, medical treatment	We collect and process your Personal Health Information for the following purposes: <ul style="list-style-type: none"> • To provide you with our products and services. • To assist in meal planning. • To improve our products and services. • To communicate with healthcare providers. • To comply with regulatory requirements. • To prevent fraud and abuse. 	No	Personal Health Information is collected from you or your representatives you have authorized to provide us with your Personal Data.
Professional Experience and Affiliation Information	Professional memberships, qualifications, certifications	We collect and process your Professional Experience and Affiliation Information for the following purposes: <ul style="list-style-type: none"> • To provide you with the products and services that you have requested. • To improve our products and services. • To comply with legal requirements. • To market our products and services to you. • To prevent fraud and abuse. 	No	Professional Experience and Affiliation Information is collected from you, your representatives you have authorized to provide us with your Personal Data, and third parties you have authorized to provide us with your Personal Data.
Special Categories of Personal Data	Genetic, biometric and health data, as well as Personal Data revealing racial and ethnic origin, political opinions, religious or ideological convictions or trade union membership.	We collect and process your Special Categories of Data for the following purposes: <ul style="list-style-type: none"> • To provide you with the products and services you have requested. • To improve our products and services. • To comply with legal requirements such as anti-discrimination laws. • To protect the safety of employees or others. • To prevent fraud and abuse. • With your consent, to market our products and services to you. • To improve our benefits. • To provide you with benefits. • To communicate with healthcare providers. 	No	Special Categories of Data is collected from you or your representatives you have authorized to provide us with your Personal Data.
Social Media Information	Social media accounts, social media content, social media history, profile information, posts, connections, likes, shares, comments, interactions, behavioral data, technical data	We collect and process your Social Media Information for the following purposes: <ul style="list-style-type: none"> • To understand your interests and preferences. • To personalize your experience. • To market our products and services to you. • To improve our products and services. • To comply with legal requirements. 	Yes	Social Media Information is collected from you, your clients, or your representatives you have authorized to provide us with your Personal Data. We may also collect your Social Media Information from third-party sources, such as social media platforms (if you interact with us through your social media account), cookies and other data collection technologies on our sites.

User Account Information	Account age, account number, email address or username, account password	<p>We collect and process your User Account Information for the following purposes:</p> <p>To create and manage your account.</p> <p>To provide you with access to our products and services.</p> <p>To protect your account from unauthorized access.</p> <p>To improve our products and services.</p> <p>To comply with legal requirements.</p>	No	<p>User Account Information is collected from you.</p> <p>We may also collect your User Account Information from third-party payment processors, if used to process your payment for services rendered.</p>
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Data Category (Contractor)	Example Personal Identifiers	Purposes for Collection/ Use	Shared with Third Parties	Sources of Personal Data
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Authenticating Information	Passwords, PIN, mother’s maiden name	<p>We collect and process your Authenticating Information of clients, employees, and contractors for the following purposes:</p> <ul style="list-style-type: none"> To authenticate your identity and grant you access to our services or systems. To prevent fraud and abuse. To comply with legal requirements, such as those related to financial services or healthcare. To improve the security of our systems and services. 	No	Authenticating Information is collected from you or your representatives you have authorized to provide us with your Personal Data.
Background Check Information	Criminal history, criminal records, driving citations	<p>We collect and process your Background Check Information for the following purposes:</p> <ul style="list-style-type: none"> To prevent fraud and abuse. 	No	Background Check Information is collected from you and the third parties you have authorized to provide your Personal Data.
Contact Information	Name, postal address, phone number, mailing address, email address, physical location	<p>We collect and process your Contact Information for the following purposes:</p> <ul style="list-style-type: none"> To verify your identity. To communicate with you about our products and services. To contact you about your account. To improve our security. To improve our events. To invite you to our events or webinars. To fulfill our contractual obligations to you. To provide you with customer support. To comply with legal requirements. To prevent fraud and abuse. To improve our products and services. 	Yes	Contact Information is collected from you and may also be collected from other third parties you have authorized to provide us with your Personal Data.
Device Information	Device type and operating system, device unique identifier, IP address, audio, video, device fingerprints	<p>We collect and process your Device Information for the following purposes:</p>	Yes	<p>Device Information is collected from you, other third parties or subscribers.</p> <p>We may also collect your Device Information</p>

		<ul style="list-style-type: none"> • To provide you with our products and services. • To protect our systems and networks. • To protect our users. • To comply with legal requirements. 		automatically through our use of cookies and other data collection technologies on our sites.
Emergency Contact Information	Name of emergency contact, contact information of emergency contact, relationship to individual, next of kin	We collect and process your Emergency Contact Information to contact your emergency contact in an emergency.	No	Emergency Contact Information is collected from you or your representatives you have authorized to provide us with your Personal Data.
Family Information	Parent’s name, dependents, and other household information	We collect and process your Family Information for the following purposes: <ul style="list-style-type: none"> • To contact your family members in the event of an emergency. 	No	Family Information is collected from you or your representatives you have authorized to provide us with your Personal Data.
Financial Detail Information	Bank account information, bank statements, compensation data, and other financial-related details such as income, investments, benefits, tax status	We collect and process your Financial Detail Information for the following purposes: <ul style="list-style-type: none"> • To process payments. • To verify your identity. • To protect our interests. • To provide you with the financial products and services that you have requested. • To comply with legal requirements. • To protect against fraud and abuse. 	No	Financial Detail Information is collected from prospective corporate acquisitions, you, or your representatives you have authorized to provide us with your Personal Data.
Government Identifier Information	Driver’s license, national identification number, passport number, social security number, national identity card details	We collect and process your Government Identifier Information for the following purposes: <ul style="list-style-type: none"> • To verify your identity. • To comply with legal requirements. • To prevent fraud and abuse. 	No	Government Identifier Information is collected from you or your representatives you have authorized to provide us with your Personal Data.
Personal Detail Information	Age, gender, date of birth, marital status, nationality, signature	We collect and process your Personal Detail Information for the following purposes: <ul style="list-style-type: none"> • To provide information that you have requested. • To provide event registration. • To improve our products and services. • To improve our events. • To comply with legal requirements. • To prevent fraud and abuse. 	No	Personal Detail Information is collected from you and third parties you have authorized to provide us with your Personal Data.
Personal Health Information	Information related to medical payment, medical claims data, medical history, products, or equipment used, health plan beneficiary, medical treatment	We collect and process your Personal Health Information for the following purposes: <ul style="list-style-type: none"> • To assist in meal planning. • To comply with regulatory requirements. • To prevent fraud and abuse. 	No	Personal Health Information is collected from you or your representatives you have authorized to provide us with your Personal Data.

Professional Experience and Affiliation Information	Professional memberships, qualifications, certifications	We collect and process your Professional Experience and Affiliation Information for the following purposes: <ul style="list-style-type: none"> • To evaluate your qualifications for employment. • To comply with legal requirements. • To prevent fraud and abuse. 	No	Professional Experience and Affiliation Information is collected from you, your representatives you have authorized to provide us with your Personal Data, and third parties you have authorized to provide us with your Personal Data.
Referral Information	Name of referral, contact information of referral, relationship of referral	We collect and process your Referral Information for the following purposes: <ul style="list-style-type: none"> • To evaluate your qualifications for employment. • To contact you about employment opportunities. • To improve our hiring process. • To comply with legal requirements. • To prevent fraud and abuse. 	No	Referral Information is collected from you, and third parties you have authorized to provide us with your Personal Data. We may also collect your Referral Information from references you list on applications and forms.
Special Categories of Personal Data	Genetic, biometric and health data, as well as Personal Data revealing racial and ethnic origin, political opinions, religious or ideological convictions or trade union membership.	We collect and process your Special Categories of Data for the following purposes: <ul style="list-style-type: none"> • To comply with legal requirements such as anti-discrimination laws. • To protect the safety of employees or others. • To conduct research on the effectiveness of training programs or the impact of diversity in the workplace. • To prevent fraud and abuse. 	No	Special Categories of Data is collected from you or your representatives you have authorized to provide us with your Personal Data.
Travel and Expense Information	Expense details, travel booking details, travel history	We collect and process your Travel and Expense Information for the following purposes: <ul style="list-style-type: none"> • To reimburse your travel expenses. • To track your travel expenses. • To ensure you are complying with company travel policies. • To improve our travel and expense management processes. • To comply with legal requirements. 	No	Travel and Expense Information is collected from you.
Workplace Welfare Information	Bullying and harassment details	We collect and process your Workplace Welfare Information for the following purposes: <ul style="list-style-type: none"> • To improve our workplace welfare programs. • To comply with legal requirements. • To prevent fraud and abuse. 	No	Workplace Welfare Information is collected from you and our employees.

Data Category (Corporate)	Example Personal Identifiers	Purposes for Collection/ Use	Shared with Third Parties	Sources of Personal Data
Contact Information	Name, postal address, phone number, mailing address, email address, physical location <ul style="list-style-type: none"> • To register you as a new client. 	We collect and process your Contact Information for the following purposes: <ul style="list-style-type: none"> • To register you as a new client. 	Yes	Contact Information is collected from you and may also be collected from other third parties.

		<ul style="list-style-type: none"> • To market our products and services. • To send you marketing materials. • To verify your identity. • To identify potential clients. • To communicate with you about our products and services. • To contact you about your account. • To improve our security. • To improve our events. • To invite you to our events or webinars. • To fulfill our contractual obligations to you. • To provide you with customer support. • To comply with legal requirements. • To prevent fraud and abuse. • To improve our products and services. 		
Device Information	Device type and operating system, device unique identifier, IP address, audio, video, device fingerprints	<p>We collect and process your Device Information for the following purposes:</p> <ul style="list-style-type: none"> • To protect our systems and networks. • To protect our users. • To comply with legal requirements. 	Yes	<p>Device Information is collected from you, other third parties or subscribers.</p> <p>We may also collect your Device Information automatically through our use of cookies and other data collection technologies on our sites.</p>
Financial Detail Information	Bank account information, bank statements, compensation data, and other financial-related details such as income, investments, benefits, tax status	<p>We collect and process your Financial Detail Information for the following purposes:</p> <ul style="list-style-type: none"> • To verify your identity. • To conduct due diligence. • To protect our interests. • To negotiate acquisitions. • To provide you with the financial products and services that you have requested. • To comply with legal requirements. • To protect against fraud and abuse. 	No	Financial Detail Information is collected from prospective corporate acquisitions, you, or your representatives you have authorized to provide us with your Personal Data.
Government Identifier Information	Driver’s license, national identification number, passport number, social security number, national identity card details	<p>We collect and process your Government Identifier Information for the following purposes:</p> <ul style="list-style-type: none"> • To verify your identity. • To comply with legal requirements. • To prevent fraud and abuse. 	No	Government Identifier Information is collected from you or your representatives you have authorized to provide us with your Personal Data.
Personal Detail Information	Age, gender, date of birth, marital status, nationality, signature	<p>We collect and process your Personal Detail Information for the following purposes:</p> <ul style="list-style-type: none"> • To provide information that you have requested. 	No	Personal Detail Information is collected from you and third parties you have authorized to provide us with your Personal Data.

		<ul style="list-style-type: none"> • To provide event registration. • To improve our products and services. • To improve our events. • To comply with legal requirements. • To prevent fraud and abuse. • To market our products and services. 		
Personal Health Information	Information related to medical payment, medical claims data, medical history, products, or equipment used, health plan beneficiary, medical treatment	<p>We collect and process your Personal Health Information for the following purposes:</p> <ul style="list-style-type: none"> • To assist in meal planning. • To comply with regulatory requirements. • To prevent fraud and abuse. 	No	Personal Health Information is collected from you or your representatives you have authorized to provide us with your Personal Data.

Data Category (Employees)	Example Personal Identifiers	Purposes for Collection/ Use	Shared with Third Parties	Sources of Personal Data
Authenticating Information	Passwords, PIN, mother’s maiden name	<p>We collect and process your Authenticating Information of clients, employees, and contractors for the following purposes:</p> <ul style="list-style-type: none"> • To authenticate your identity and grant you access to our services or systems. • To prevent fraud and abuse. • To comply with legal requirements, such as those related to financial services or healthcare. • To improve the security of our systems and services. 	No	Authenticating Information is collected from you or your representatives you have authorized to provide us with your Personal Data.
Beneficiary Contact Information	Name of beneficiary contact, telephone number of beneficiary contact, address of beneficiary contact, relationship to individual	<p>We collect and process Beneficiary Contact Information of clients and employees for the following purposes:</p> <ul style="list-style-type: none"> • To contact the beneficiary in the event of your death. • To provide information about benefits to the beneficiary. • To comply with legal requirements, such as those related to employment law or tax law. • To protect the privacy of your beneficiary contact information. 	No	Beneficiary Contact Information is collected from you or your representatives you have authorized to provide us with your Personal Data.
Background Check Information	Criminal history, criminal records, driving citations	<p>We collect and process your Background Check Information for the following purposes:</p> <ul style="list-style-type: none"> • To prevent fraud and abuse. • To verify your identity and qualifications. • To assess your suitability for the position. • To comply with legal requirements, such as those related to employment law or 	No	Background Check Information is collected from you and third parties you have authorized to provide us with your Personal Data.

		anti-discrimination law. <ul style="list-style-type: none"> • To protect the safety and security of our employees and customers. • To prevent fraud and abuse. • To improve our decision-making about hiring, promotion, and other employment-related decisions. 		
Children Information	Names of children, age or gender of children, birth date, address of children, activities associated with children	We collect and process Clients’ Children Information only with the consent of a parent or guardian for the following purposes: <ul style="list-style-type: none"> • To comply with our legal obligation to protect the privacy of children. • To provide employees with benefits. • To provide employees with services. 	No	Children Information is collected from you or your representatives you have authorized to provide us with your Personal Data.
Contact Information	Name, postal address, phone number, mailing address, email address, physical location	We collect and process your Contact Information for the following purposes: <ul style="list-style-type: none"> • To verify your identity. • To communicate with you about our products and services. • To contact you about your account. • To improve our security. • To improve our events. • To invite you to our events or webinars. • To fulfill our contractual obligations to you. • To provide you with customer support. • To comply with legal requirements. • To prevent fraud and abuse. • To improve our products and services. 	Yes	Contact Information is collected from you and may also be collected from other third parties you have authorized to provide us with your Personal Data.
Device Information	Device type and operating system, device unique identifier, IP address, audio, video, device fingerprints	We collect and process your Device Information for the following purposes: <ul style="list-style-type: none"> • To provide you with our products and services. • To protect our systems and networks. • To protect our users. • To comply with legal requirements. 	Yes	Device Information is collected from you, other third parties or subscribers. We may also collect your Device Information automatically through our use of cookies and other data collection technologies on our sites.

Education and Skills Information	Academic transcripts, educational degrees, education training and history, languages, letters of recommendation	<p>We collect and process your Education and Skills Information for the following purposes:</p> <ul style="list-style-type: none"> • To assess the potential advancement of employees. • To provide training and development opportunities for employees. • To improve the company’s recruitment and hiring processes. 	No	<p>Education and Skills Information is collected from you.</p> <p>We may also collect Education and Skills Information directly from third-party recruiters you are using to find employment which you have authorized to provide us with your Personal Data.</p>
Employment Information	Benefits and entitlements data, company/entity, contract type, hours of work, job title, salary/wage, workers compensation claims, start date, end date, reason for termination, employee performance results, record of absence, time tracking, annual leave, office location, previous work history, grievances and complaints, health and safety-related information and reporting, job application details, disciplinary action, exit interview	<p>We collect and process your Employment Information for the following purposes:</p> <ul style="list-style-type: none"> • To assess the potential advancement of employees. • To provide training and development opportunities for employees. • To manage our workforce. • To comply with legal requirements. • To provide you with the benefits and services to which you are entitled. 	No	<p>Employment Information is collected from you or your representatives you have authorized to provide us with your Personal Data.</p> <p>We may also collect Education and Skills Information directly from third-party recruiters you are using to find employment which you have authorized to provide us with your Personal Data.</p>
Emergency Contact Information	Name of emergency contact, contact information of emergency contact, relationship to individual, next of kin	We collect and process your Emergency Contact Information to contact your emergency contact in an emergency.	No	Emergency Contact Information is collected from you or your representatives you have authorized to provide us with your Personal Data.
Family Information	Parent’s name, dependents, and other household information	<p>We collect and process your Family Information for the following purposes:</p> <ul style="list-style-type: none"> • To contact your family members in the event of an emergency. 	No	Family Information is collected from you or your representatives you have authorized to provide us with your Personal Data.
Financial Detail Information	Bank account information, bank statements, compensation data, and other financial-related details such as income, investments, benefits, tax status	<p>We collect and process your Financial Detail Information for the following purposes:</p> <ul style="list-style-type: none"> • To process payroll. • To verify your identity. • To conduct due diligence. • To protect our interests. • To provide you with the financial products and services that you have requested. • To comply with legal requirements. • To protect against fraud and abuse. 	No	Financial Detail Information is collected from prospective corporate acquisitions, you, or your representatives you have authorized to provide us with your Personal Data.
Government Identifier Information	Driver’s license, national identification number, passport number, social security number, national identity card details	<p>We collect and process your Government Identifier Information for the following purposes:</p> <ul style="list-style-type: none"> • To verify your identity. • To comply with legal requirements. • To prevent fraud and abuse. • To provide government- 	No	Government Identifier Information is collected from you or your representatives you have authorized to provide us with your Personal Data.

		mandated benefits.		
Personal Detail Information	Age, gender, date of birth, marital status, nationality, signature	We collect and process your Personal Detail Information for the following purposes: <ul style="list-style-type: none"> • To provide employment. • To provide benefits. • To provide information that you have requested. • To provide event registration. • To improve our products and services. • To improve our employment practices. • To improve our benefits. • To provide you with benefits. • To improve our events. • To comply with legal requirements. • To prevent fraud and abuse. • To market employment opportunities. • To market our benefits to you. 	No	Personal Detail Information is collected from you and third parties you have authorized to provide us with your Personal Data.
Personal Health Information	Information related to medical payment, medical claims data, medical history, products, or equipment used, health plan beneficiary, medical treatment	We collect and process your Personal Health Information for the following purposes: <ul style="list-style-type: none"> • To assist in meal planning. • To improve our products and services. • To improve our benefits. • To provide you with benefits. • To communicate with healthcare providers. • To comply with regulatory requirements. • To prevent fraud and abuse. 	No	Personal Health Information is collected from you or your representatives you have authorized to provide us with your Personal Data.
Special Categories of Personal Data	Genetic, biometric and health data, as well as Personal Data revealing racial and ethnic origin, political opinions, religious or ideological convictions or trade union membership.	We collect and process your Special Categories of Data for the following purposes: <ul style="list-style-type: none"> • To comply with legal requirements such as anti-discrimination laws. • To protect the safety of employees or others. • To conduct research on the effectiveness of training programs or the impact of diversity in the workplace. • To prevent fraud and abuse. • To improve our benefits. • To provide you with benefits. • To communicate with healthcare providers. 	No	Special Categories of Data is collected from you or your representatives you have authorized to provide us with your Personal Data.
Travel and Expense Information	Expense details, travel booking details, travel history	We collect and process your Travel and Expense Information for the following purposes: <ul style="list-style-type: none"> • To reimburse your travel expenses. • To track your travel expenses. • To ensure you are complying with company travel policies. 	No	Travel and Expense Information is collected from you.

		<ul style="list-style-type: none"> • To improve our travel and expense management processes. • To comply with legal requirements. 		
User Account Information	Account age, account number, email address or username, account password	We collect and process your User Account Information for the following purposes: <ul style="list-style-type: none"> • To create and manage your account. • To provide you with access to our products and services. • To protect your account from unauthorized access. • To improve our products and services. • To comply with legal requirements. 	No	User Account Information is collected from you. We may also collect your User Account Information from third-party payment processors, if used to process your payment for services rendered.
Workplace Welfare Information	Bullying and harassment details	We collect and process your Workplace Welfare Information for the following purposes: <ul style="list-style-type: none"> • To provide you with the benefits to which you are entitled. • To manage your compensation and benefits. • To improve our workplace welfare programs. • To comply with legal requirements. • To prevent fraud and abuse. 	No	Workplace Welfare Information is collected from you and our employees.

Data Category (Event Attendees)	Example Personal Identifiers	Purposes for Collection/ Use	Shared with Third Parties	Sources of Personal Data
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Contact Information	Name, postal address, phone number, mailing address, email address, physical location <ul style="list-style-type: none"> • To register you as a new client. • To market our products and services. • To send you marketing materials. • To verify your identity. • To identify potential clients. • To communicate with you about our products and services. • To contact you about your account. • To improve our security. • To improve our events. • To invite you to our events or webinars. • To fulfill our contractual obligations to you. • To provide you with customer support. • To comply with legal requirements. • To prevent fraud and abuse. • To improve our products and 	We collect and process your Contact Information for the following purposes:	Yes	Contact Information is collected from you and may also be collected from other third parties you have authorized to provide us with your Personal Data.
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		services.		
Device Information	Device type and operating system, device unique identifier, IP address, audio, video, device fingerprints	<p>We collect and process your Device Information for the following purposes:</p> <ul style="list-style-type: none"> • To provide you with our products and services. • To protect our systems and networks. • To protect our users. • To comply with legal requirements. 	Yes	<p>Device Information is collected from you, other third parties or subscribers.</p> <p>We may also collect your Device Information automatically through our use of cookies and other data collection technologies on our sites.</p>
Emergency Contact Information	Name of emergency contact, contact information of emergency contact, relationship to individual, next of kin	We collect and process your Emergency Contact Information to contact your emergency contact in an emergency.	No	Emergency Contact Information is collected from you or your representatives you have authorized to provide us with your Personal Data.
Family Information	Parent’s name, dependents, and other household information	<p>We collect and process your Family Information for the following purposes:</p> <ul style="list-style-type: none"> • To contact your family members in the event of an emergency. 	No	Family Information is collected from you or your representatives you have authorized to provide us with your Personal Data.
Government Identifier Information	Driver’s license, national identification number, passport number, social security number, national identity card details	<p>We collect and process your Government Identifier Information for the following purposes:</p> <ul style="list-style-type: none"> • To verify your identity. • To comply with legal requirements. • To prevent fraud and abuse. 	No	Government Identifier Information is collected from you or your representatives you have authorized to provide us with your Personal Data.
Personal Detail Information	Age, gender, date of birth, marital status, nationality, signature, image/video, voice/audio recording	<p>We collect and process your Personal Detail Information for the following purposes:</p> <ul style="list-style-type: none"> • To provide products and services that you have requested. • To provide information that you have requested. • To provide event registration. • To improve our products and services. • To improve our events. • To comply with legal requirements. • To prevent fraud and abuse. • To market our products and services. • To provide products and services to you. <ul style="list-style-type: none"> • Event management 	Yes	Personal Detail Information is collected from you and third parties you have authorized to provide us with your Personal Data.
Personal Health Information	Information related to medical payment, medical claims data, medical history, products, or equipment used, health plan beneficiary, medical treatment	<p>We collect and process your Personal Health Information for the following purposes:</p> <ul style="list-style-type: none"> • To assist in meal planning. 	No	Personal Health Information is collected from you or your representatives you have authorized to provide us with your Personal Data.
Professional Experience and Affiliation Information	Professional memberships, qualifications, certifications	<p>We collect and process your Professional Experience and Affiliation Information for the following purposes:</p> <ul style="list-style-type: none"> • To improve our products and services. 	No	Professional Experience and Affiliation Information is collected from you, your representatives you have authorized to provide us with your Personal Data, and third parties you have authorized to provide us with your Personal Data.

Social Media Information	Social media accounts, social media content, social media history, profile information, posts, connections, likes, shares, comments, interactions, behavioral data, technical data	We collect and process your Social Media Information for the following purposes: <ul style="list-style-type: none"> • To market our products and services to you. • To improve our products and services. • To comply with legal requirements. 	Yes	Social Media Information is collected from you, your clients, or your representatives you have authorized to provide us with your Personal Data. We may also collect your Social Media Information from third-party sources, such as social media platforms (if you interact with us through your social media account), cookies and other data collection technologies on our sites.
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Data Category (Job Applicants)	Example Personal Identifiers	Purposes for Collection/ Use	Shared with Third Parties	Sources of Personal Data
Background Check Information	Criminal history, criminal records, driving citations	We collect and process your Background Check Information for the following purposes: <ul style="list-style-type: none"> • To understand your needs and interests. • To prevent fraud and abuse. • To verify your identity and qualifications. • To assess your suitability for the position. • To comply with legal requirements, such as those related to employment law or anti-discrimination law. • To protect the safety and security of our employees and customers. • To prevent fraud and abuse. • To improve our decision-making about hiring, promotion, and other employment-related decisions. 	No	Background Check Information is collected from you and third parties you have authorized to provide us with your Personal Data.
Contact Information	Name, postal address, phone number, mailing address, email address, physical location	We collect and process your Contact Information for the following purposes: <ul style="list-style-type: none"> • To verify your identity. • To communicate with you about our products and services. • To improve our security. • To improve our events. • To invite you to our events or webinars. • To fulfill our contractual obligations to you. • To provide you with customer support. • To comply with legal requirements. • To prevent fraud and abuse. • To improve our products and services. 	Yes	Contact Information is collected from you and may also be collected from other third parties you have authorized to provide us with your Personal Data.

Device Information	Device type and operating system, device unique identifier, IP address, audio, video, device fingerprints	<p>We collect and process your Device Information for the following purposes:</p> <ul style="list-style-type: none"> • To provide you with our products and services. • To protect our systems and networks. • To protect our users. • To comply with legal requirements. 	Yes	<p>Device Information is collected from you, other third parties or subscribers.</p> <p>We may also collect your Device Information automatically through our use of cookies and other data collection technologies on our sites.</p>
Education and Skills Information	Academic transcripts, educational degrees, education training and history, languages, letters of recommendation	<p>We collect and process your Education and Skills Information for the following purposes:</p> <ul style="list-style-type: none"> • To verify the educational qualifications of job applicants. • To improve the company’s recruitment and hiring processes. 	No	<p>Education and Skills Information is collected from you.</p> <p>We may also collect Education and Skills Information directly from third-party recruiters you are using to find employment which you have authorized to provide us with your Personal Data.</p>
Employment Information	Benefits and entitlements data, company/entity, contract type, hours of work, job title, salary/wage, workers compensation claims, start date, end date, reason for termination, employee performance results, record of absence, time tracking, annual leave, office location, previous work history, grievances and complaints, health and safety-related information and reporting, job application details, disciplinary action, exit interview	<p>We collect and process your Employment Information for the following purposes:</p> <ul style="list-style-type: none"> • To verify the educational qualifications of job applicants. • To provide training and development opportunities for employees. • To improve the company’s recruitment and hiring processes. • To comply with legal requirements. 	No	<p>Employment Information is collected from you or your representatives you have authorized to provide us with your Personal Data.</p> <p>We may also collect Education and Skills Information directly from third-party recruiters you are using to find employment which you have authorized to provide us with your Personal Data.</p>
Emergency Contact Information	Name of emergency contact, contact information of emergency contact, relationship to individual, next of kin	We collect and process your Emergency Contact Information to contact your emergency contact in an emergency.	No	Emergency Contact Information is collected from you or your representatives you have authorized to provide us with your Personal Data.
Government Identifier Information	Driver’s license, national identification number, passport number, social security number, national identity card details	<p>We collect and process your Government Identifier Information for the following purposes:</p> <ul style="list-style-type: none"> • To verify your identity. • To comply with legal requirements. • To prevent fraud and abuse. 	No	Government Identifier Information is collected from you or your representatives you have authorized to provide us with your Personal Data.
Personal Detail Information	Age, gender, date of birth, marital status, nationality, signature, image/video	<p>We collect and process your Personal Detail Information for the following purposes:</p> <ul style="list-style-type: none"> • To provide employment. • To provide information that you have requested. • To provide event registration. 	Yes	Personal Detail Information is collected from you and third parties you have authorized to provide us with your Personal Data.

		<ul style="list-style-type: none"> • To comply with legal requirements. • To prevent fraud and abuse. • To market employment opportunities. • To market our benefits to you. • Manage our workforce and provide them with employment, training, compensation, or benefits. <ul style="list-style-type: none"> • Employee hiring 		
Personal Health Information	Information related to medical payment, medical claims data, medical history, products, or equipment used, health plan beneficiary, medical treatment	<p>We collect and process your Personal Health Information for the following purposes:</p> <ul style="list-style-type: none"> • To assist in meal planning. 	No	Personal Health Information is collected from you or your representatives you have authorized to provide us with your Personal Data.
Professional Experience and Affiliation Information	Professional memberships, qualifications, certifications	<p>We collect and process your Professional Experience and Affiliation Information for the following purposes:</p> <ul style="list-style-type: none"> • To evaluate your qualifications for employment. • To improve our products and services. • To comply with legal requirements. • To prevent fraud and abuse. 	No	Professional Experience and Affiliation Information is collected from you, your representatives you have authorized to provide us with your Personal Data, and third parties you have authorized to provide us with your Personal Data.
Referral Information	Name of referral, contact information of referral, relationship of referral	<p>We collect and process your Referral Information for the following purposes:</p> <ul style="list-style-type: none"> • To evaluate your qualifications for employment. • To contact you about employment opportunities. • To improve our hiring process. • To comply with legal requirements. • To prevent fraud and abuse. 	No	<p>Referral Information is collected from you, and third parties you have authorized to provide us with your Personal Data.</p> <p>We may also collect your Referral Information from references you list on applications and forms.</p>
Special Categories of Personal Data	Genetic, biometric and health data, as well as Personal Data revealing racial and ethnic origin, political opinions, religious or ideological convictions or trade union membership.	<p>We collect and process your Special Categories of Data for the following purposes:</p> <ul style="list-style-type: none"> • To comply with legal requirements such as anti-discrimination laws. • To protect the safety of employees or others. • To conduct research on the effectiveness of training programs or the impact of diversity in the workplace. • To prevent fraud and abuse. 	No	Special Categories of Data is collected from you or your representatives you have authorized to provide us with your Personal Data.

Data Category (Office Visitors)	Example Personal Identifiers	Purposes for Collection/ Use	Shared with Third Parties	Sources of Personal Data
Contact Information	Name, postal address, phone number, mailing address, email address, physical location	<div>We collect and process your Contact Information for the following purposes:</div> <ul style="list-style-type: none">To market our products and services.To send you marketing materials.To verify your identity.To identify potential clients.To communicate with you about our products and services.To contact you about your office visit.To improve our security.To improve our events.To invite you to our events or webinars.To fulfill our contractual obligations to you.To provide you with customer support.To comply with legal requirements.To prevent fraud and abuse.To improve our products and services.	Yes	Contact Information is collected from you and may also be collected from other third parties you have authorized to provide us with your Personal Data.
Device Information	Device type and operating system, device unique identifier, IP address, audio, video, device fingerprints	<div>We collect and process your Device Information for the following purposes:</div> <ul style="list-style-type: none">To provide you with our products and services.To protect our systems and networks.To protect our users.To comply with legal requirements.	Yes	<div>Device Information is collected from you, other third parties or subscribers.</div> <div>We may also collect your Device Information automatically through our use of cookies and other data collection technologies on our sites.</div>
Emergency Contact Information	Name of emergency contact, contact information of emergency contact, relationship to individual, next of kin	We collect and process your Emergency Contact Information to contact your emergency contact in an emergency.	No	Emergency Contact Information is collected from you or your representatives you have authorized to provide us with your Personal Data.
Government Identifier Information	Driver’s license, national identification number, passport number, social security number, national identity card details	<div>We collect and process your Government Identifier Information for the following purposes:</div> <ul style="list-style-type: none">To verify your identity.To comply with legal requirements.To prevent fraud and abuse.	No	Government Identifier Information is collected from you or your representatives you have authorized to provide us with your Personal Data.
Personal Detail Information	Age, gender, date of birth, marital status, nationality, signature	<div>We collect and process your Personal Detail Information for the following purposes:</div> <ul style="list-style-type: none">To provide products and services that you have requested.To provide information that you have requested.To provide event registration.To improve our products and services.To improve our events.	No	Personal Detail Information is collected from you and third parties you have authorized to provide us with your Personal Data.

		<ul style="list-style-type: none"> • To comply with legal requirements. • To prevent fraud and abuse. 		
Personal Health Information	Information related to medical payment, medical claims data, medical history, products, or equipment used, health plan beneficiary, medical treatment	We collect and process your Personal Health Information for the following purposes: <ul style="list-style-type: none"> • To assist in meal planning. 	No	Personal Health Information is collected from you or your representatives you have authorized to provide us with your Personal Data.

Data Category (Prospective Clients)	Example Personal Identifiers	Purposes for Collection/ Use	Shared with Third Parties	Sources of Personal Data
Background Check Information	Criminal history, criminal records, driving citations	We collect and process your Background Check Information for the following purposes: <ul style="list-style-type: none"> • To understand your needs and interests. • To assess your suitability for our products or services. • To comply with legal requirements, such as those related to anti-money laundering or know-your-customer laws. • To prevent fraud and abuse. • To improve our decision-making about marketing and sales. 	No	Background Check Information is collected from you and third parties you have authorized to provide us with your Personal Data.
Contact Information	Name, postal address, phone number, mailing address, email address, physical location	We collect and process your Contact Information for the following purposes: <ul style="list-style-type: none"> • To register you as a new client. • To market our products and services. • To send you marketing materials. • To verify your identity. • To identify potential clients. • To communicate with you about our products and services. • To improve our security. • To improve our events. • To invite you to our events or webinars. • To fulfill our contractual obligations to you. • To provide you with customer support. • To comply with legal requirements. • To prevent fraud and abuse. • To improve our products and services. 	Yes	Contact Information is collected from you and may also be collected from other third parties you have authorized to provide us with your Personal Data. Contact Information is collected from you from publicly accessible sources, such as professional networking sites (e.g., LinkedIn), forums, and other publicly available forums, where you have chosen to make your information visible.
Device Information	Device type and operating system, device unique identifier, IP address, audio, video, device fingerprints	We collect and process your Device Information for the following purposes: <ul style="list-style-type: none"> • To provide you with our products and services. 	Yes	Device Information is collected from you, other third parties or subscribers. We may also collect your Device Information automatically through our use of cookies and other data collection technologies on our sites.

		<ul style="list-style-type: none"> • To protect our systems and networks. • To protect our users. • To comply with legal requirements. 		
Emergency Contact Information	Name of emergency contact, contact information of emergency contact, relationship to individual, next of kin	We collect and process your Emergency Contact Information to contact your emergency contact in an emergency.	No	Emergency Contact Information is collected from you or your representatives you have authorized to provide us with your Personal Data.
Government Identifier Information	Driver’s license, national identification number, passport number, social security number, national identity card details	We collect and process your Government Identifier Information for the following purposes: <ul style="list-style-type: none"> • To verify your identity. • To comply with legal requirements. • To prevent fraud and abuse. 	No	Government Identifier Information is collected from you or your representatives you have authorized to provide us with your Personal Data.
Personal Detail Information	Age, gender, date of birth, marital status, nationality, signature	We collect and process your Personal Detail Information for the following purposes: <ul style="list-style-type: none"> • To provide products and services that you have requested. • To provide information that you have requested. • To provide event registration. • To improve our products and services. • To improve our events. • To comply with legal requirements. • To prevent fraud and abuse. • To market our products and services. 	No	Personal Detail Information is collected from you and third parties you have authorized to provide us with your Personal Data. Personal Detail Information is collected from you from publicly accessible sources, such as professional networking sites (e.g., LinkedIn), forums, and other publicly available forums, where you have chosen to make your information visible.
Personal Health Information	Information related to medical payment, medical claims data, medical history, products, or equipment used, health plan beneficiary, medical treatment	We collect and process your Personal Health Information for the following purposes: <ul style="list-style-type: none"> • To assist in meal planning. 	No	Personal Health Information is collected from you or your representatives you have authorized to provide us with your Personal Data.
Professional Experience and Affiliation Information	Professional memberships, qualifications, certifications	We collect and process your Professional Experience and Affiliation Information for the following purposes: <ul style="list-style-type: none"> • To improve our products and services. • To comply with legal requirements. • To market our products and services to you. • To prevent fraud and abuse. 	No	Professional Experience and Affiliation Information is collected from you, your representatives you have authorized to provide us with your Personal Data, and third parties you have authorized to provide us with your Personal Data.

Social Media Information	Social media accounts, social media content, social media history, profile information, posts, connections, likes, shares, comments, interactions, behavioral data, technical data	We collect and process your Social Media Information for the following purposes: <ul style="list-style-type: none"> To market our products and services to you. To improve our products and services. To comply with legal requirements. 	Yes	Social Media Information is collected from you, your clients, or your representatives you have authorized to provide us with your Personal Data. We may also collect your Social Media Information from third-party sources, such as social media platforms (if you interact with us through your social media account), cookies and other data collection technologies on our sites.
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Data Category (Subscribers)	Example Personal Identifiers	Purposes for Collection/ Use	Shared with Third Parties	Sources of Personal Data
Contact Information	Name, postal address, phone number, mailing address, email address, physical location	We collect and process your Contact Information for the following purposes: <ul style="list-style-type: none"> To market our products and services. To send you marketing materials. To verify your identity. To identify potential clients. To communicate with you about our products and services. To contact you about your account. To improve our security. To improve our events. To invite you to our events or webinars. To fulfill our contractual obligations to you. To provide you with customer support. To comply with legal requirements. To prevent fraud and abuse. To improve our products and services. 	Yes	Contact Information is collected from you and may also be collected from other third parties you have authorized to provide us with your Personal Data.
Device Information	Device type and operating system, device unique identifier, IP address, audio, video, device fingerprints	We collect and process your Device Information for the following purposes: <ul style="list-style-type: none"> To provide you with our products and services. To improve our products and services that you have requested. To protect our systems and networks. To protect our users. To comply with legal requirements. To market our products and services to you. 	Yes	Device Information is collected from you, other third parties or subscribers. We may also collect your Device Information automatically through our use of cookies and other data collection technologies on our sites.
Emergency Contact Information	Name of emergency contact, contact information of emergency contact, relationship to individual, next of kin	We collect and process your Emergency Contact Information to contact your emergency contact in an emergency.	No	Emergency Contact Information is collected from you or your representatives you have authorized to provide us with your Personal Data.

Personal Detail Information	Age, gender, date of birth, marital status, nationality, signature	We collect and process your Personal Detail Information for the following purposes: <ul style="list-style-type: none"> To provide products and services that you have requested. To provide information that you have requested. To improve our products and services. To improve our events. To comply with legal requirements. To prevent fraud and abuse. To market our products and services. 	No	Personal Detail Information is collected from you and third parties you have authorized to provide us with your Personal Data.
Social Media Information	Social media accounts, social media content, social media history, profile information, posts, connections, likes, shares, comments, interactions, behavioral data, technical data	We collect and process your Social Media Information for the following purposes: <ul style="list-style-type: none"> To understand your interests and preferences. To personalize your experience. To market our products and services to you. To improve our products and services. To comply with legal requirements. 	Yes	Social Media Information is collected from you, your clients, or your representatives you have authorized to provide us with your Personal Data. We may also collect your Social Media Information from third-party sources, such as social media platforms (if you interact with us through your social media account), cookies and other data collection technologies on our sites.

Data Category (Third Parties)	Example Personal Identifiers	Purposes for Collection/ Use	Shared with Third Parties	Sources of Personal Data
Contact Information	Name, postal address, phone number, mailing address, email address, physical location	We collect and process your Contact Information for the following purposes: <ul style="list-style-type: none"> To verify your identity. To communicate with you about our products and services. To improve our security. To improve our events. To invite you to our events or webinars. To fulfill our contractual obligations to you. To comply with legal requirements. To prevent fraud and abuse. To improve our products and services. 	Yes	Contact Information is collected from you and may also be collected from other third parties you have authorized to provide us with your Personal Data.

Device Information	Device type and operating system, device unique identifier, IP address, audio, video, device fingerprints	<p>We collect and process your Device Information for the following purposes:</p> <ul style="list-style-type: none"> • To provide you with our products and services. • To protect our systems and networks. • To protect our users. • To comply with legal requirements. 	Yes	<p>Device Information is collected from you, other third parties or subscribers.</p> <p>We may also collect your Device Information automatically through our use of cookies and other data collection technologies on our sites.</p>
Emergency Contact Information	Name of emergency contact, contact information of emergency contact, relationship to individual, next of kin	We collect and process your Emergency Contact Information to contact your emergency contact in an emergency.	No	Emergency Contact Information is collected from you or your representatives you have authorized to provide us with your Personal Data.
Financial Detail Information	Bank account information, bank statements, compensation data, and other financial-related details such as income, investments, benefits, tax status	<p>We collect and process your Financial Detail Information for the following purposes:</p> <ul style="list-style-type: none"> • To process payments. • To verify your identity. • To conduct due diligence. • To protect our interests. • To negotiate acquisitions. • To comply with legal requirements. • To protect against fraud and abuse. 	No	Financial Detail Information is collected from prospective corporate acquisitions, you, or your representatives you have authorized to provide us with your Personal Data.
Government Identifier Information	Driver’s license, national identification number, passport number, social security number, national identity card details	<p>We collect and process your Government Identifier Information for the following purposes:</p> <ul style="list-style-type: none"> • To verify your identity. • To comply with legal requirements. • To prevent fraud and abuse. 	No	Government Identifier Information is collected from you or your representatives you have authorized to provide us with your Personal Data.
Personal Detail Information	Age, gender, date of birth, marital status, nationality, signature	<p>We collect and process your Personal Detail Information for the following purposes:</p> <ul style="list-style-type: none"> • To provide information that you have requested. • To provide event registration. • To improve our products and services. • To improve our events. • To comply with legal requirements. • To prevent fraud and abuse. 	No	Personal Detail Information is collected from you and third parties you have authorized to provide us with your Personal Data.
Personal Health Information	Information related to medical payment, medical claims data, medical history, products, or equipment used, health plan beneficiary, medical treatment	<p>We collect and process your Personal Health Information for the following purposes:</p> <ul style="list-style-type: none"> • To assist in meal planning. • To comply with regulatory requirements. • To prevent fraud and abuse. 	No	Personal Health Information is collected from you or your representatives you have authorized to provide us with your Personal Data.

Referral Information	Name of referral, contact information of referral, relationship of referral	<div>We collect and process your Referral Information for the following purposes:</div> <div><ul style="list-style-type: none">• To evaluate your qualifications for employment.• To contact you about employment opportunities.• To improve our hiring process.• To comply with legal requirements.• To prevent fraud and abuse.</div>	No	<div>Referral Information is collected from you, and third parties you have authorized to provide us with your Personal Data.</div> <div>We may also collect your Referral Information from references you list on applications and forms.</div>
Special Categories of Personal Data	Genetic, biometric and health data, as well as Personal Data revealing racial and ethnic origin, political opinions, religious or ideological convictions or trade union membership.	<div>We collect and process your Special Categories of Data for the following purposes:</div> <div><ul style="list-style-type: none">• To comply with legal requirements such as anti-discrimination laws.• To protect the safety of employees or others.• To conduct research on the effectiveness of training programs or the impact of diversity in the workplace.</div>	No	Special Categories of Data is collected from you or your representatives you have authorized to provide us with your Personal Data.
Workplace Welfare Information	Bullying and harassment details	<div>We collect and process your Workplace Welfare Information for the following purposes:</div> <div><ul style="list-style-type: none">• To improve our workplace welfare programs.• To comply with legal requirements.• To prevent fraud and abuse.</div>	No	Workplace Welfare Information is collected from you and our employees.

Data Category (Website Users)	Example Personal Identifiers	Purposes for Collection/ Use	Shared with Third Parties	Sources of Personal Data
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Browsing Information	Browsing time, cookie information, IP address, web beacons, device fingerprinting, imprecise geolocation information, web browsing history, search history, clickstream data, social media activity, ad tracking data, pixels, device unique identifier, browser type and settings, application usage data	<div>We collect and process your Browsing Information for the following purposes:</div> <div><ul style="list-style-type: none">• To understand your interests and needs.• To improve the performance of our marketing campaigns.• To improve the performance of our website.• To personalize the content and advertising that we show to users.• To prevent fraud and abuse.• To comply with legal requirements.• To improve the security of our website, systems, and services.</div>	Yes	<div>We use third parties to collect Browsing Information on our behalf, to improve the performance of our website and to personalize the content and advertising that we show to you.</div> <div>We may also collect your Browsing Information automatically through our use of cookies and other data collection technologies on our sites.</div>
Contact Information	Name, postal address, phone number, mailing address, email address, physical location	We collect and process your Contact Information for the following purposes:	Yes	Contact Information is collected from you and may also be collected from other third parties you have authorized to provide us with your Personal Data.

		<ul style="list-style-type: none"> • To market our products and services. • To send you marketing materials. • To verify your identity. • To identify potential clients. • To communicate with you about our products and services. • To contact you about your account. • To improve our security. • To improve our events. • To invite you to our events or webinars. • To provide you with customer support. • To comply with legal requirements. • To prevent fraud and abuse. • To improve our products and services. 		
Device Information	Device type and operating system, device unique identifier, IP address, audio, video, device fingerprints	<p>We collect and process your Device Information for the following purposes:</p> <ul style="list-style-type: none"> • To provide you with our products and services. • To improve our products and services that you have requested. • To protect our systems and networks. • To protect our users. • To comply with legal requirements. • To market our products and services to you. 	Yes	<p>Device Information is collected from you, other third parties or subscribers.</p> <p>We may also collect your Device Information automatically through our use of cookies and other data collection technologies on our sites.</p>
Social Media Information	Social media accounts, social media content, social media history, profile information, posts, connections, likes, shares, comments, interactions, behavioral data, technical data	<p>We collect and process your Social Media Information for the following purposes:</p> <ul style="list-style-type: none"> • To understand your interests and preferences. • To personalize your experience. • To market our products and services to you. • To improve our products and services. • To comply with legal requirements. 	Yes	<p>Social Media Information is collected from you, your clients, or your representatives you have authorized to provide us with your Personal Data.</p> <p>We may also collect your Social Media Information from third-party sources, such as social media platforms (if you interact with us through your social media account), cookies and other data collection technologies on our sites.</p>

Browsing and Device Information

Like many companies, your visit to our website triggers automatic collection of cookies and other tracking technologies. We and third parties, including our third-party service providers may automatically collect certain details about your device and browsing, like IP address, browser type, and page views through

the use of cookies and other tracking tools like analytics and pixels. This information may be used to understand your interests and needs, improve the performance of our marketing campaigns, improve the performance of our [website](#), personalize the content and advertising that we show to you, prevent fraud and abuse, comply with legal requirements, or improve the security of our website, systems, and services. If you no longer wish to receive promotional communications from us, you may at any time request that we discontinue sending you such materials by contacting us using [this link](#).

Please visit our [Cookies and Other Tracking Technologies Notice](#) for more information.

Children’s Data

Our services are not directed at Children, and we do not knowingly collect any Personal Data from Children under the age of 16 without prior verifiable parental consent.

Certain Citrin Cooperman services, may process Personal Data related to Children, such as their date of birth, address, or other identifiable information to fulfill our service obligations to you. This Personal Data is not collected directly from Children, but from other parties such as your representative, or directly from you as the parent or guardian of the Child (e.g., so that the Child may be named a beneficiary to an insurance policy or pension plan).

If Citrin Cooperman learns that a Child under the age of 16 has submitted Personal Data without parental consent, we will take all reasonable measures to delete the data as soon as possible and to not use such data for any purpose, except where necessary to protect the safety of the Child or others as required or allowed by law. If you believe a Child under the age of 16 has provided us with Personal Data, please contact us at privacy@citrincooperman.com or use the mailing address below.

Categories of Third Parties to Whom Personal Data Is Potentially Disclosed

We may need to disclose your Personal Data in certain circumstances as outlined below to carry out our business. We take your privacy seriously and will only disclose your Personal Data when it is necessary to do so. Furthermore, we have put safeguards in place to protect your Personal Data and will only disclose it to third parties who have agreed to protect it as well.

Third-party suppliers, service providers, affiliates, and business partners: Citrin Cooperman may disclose Personal Data to third-party suppliers, service providers, affiliates, and business partners to assist us in meeting business operation needs and to deliver our services and functions.

Vendors: Citrin Cooperman may disclose Personal Data to vendors who provide services to the firm, such as information technology services, cloud computing services, and data storage services. This is done to allow these vendors to perform their services effectively and efficiently.

Investors: Citrin Cooperman may disclose Personal Data to investors to provide them with information about the firm's financial performance and operations. This disclosure is necessary for investors to make informed investment decisions.

Regulators: Citrin Cooperman may disclose Personal Data to regulators to comply with legal and regulatory requirements. For example, Citrin Cooperman may be required to disclose Personal Data to the Securities and Exchange Commission in connection with an audit of a public company.

Law enforcement: Citrin Cooperman may disclose Personal Data to law enforcement agencies if required to do so by law. For example, Citrin Cooperman may be required to disclose Personal Data to the Federal Bureau of Investigation in connection with an investigation of a financial crime.

Third-Party Links and Services

This site and all websites linked to the website contain third-party links that can be used to access certain services provided by third parties. This Privacy Notice does not address data collection or processing by any of those parties.

Do Not Track/Global Privacy Control (GPC)

Track (“DNT”) or “Global Privacy Control” is a preference setting offered by various internet browsers, whereby a signal is automatically sent by the browser to each website visited requesting that the user’s activities are not tracked by that website and that the website does not enable onward tracking to other websites. You can usually access your browser’s DNT option in your browser’s preferences. If that occurs, the website visited will not recognize you upon return to that website or save your passwords or usernames, and some other features of a website may become unavailable or not function properly.

Lawful Basis for Processing Your Personal Data

We rely on the following legal basis to collect and use your Personal Data:

Consent: We may ask for your permission to use your Personal Data, such as if we need your permission to process sensitive information about you or engage in certain marketing activities. If we obtain your consent as a legal basis for processing your data, you can revoke your consent at any time.

Contract: Where we offer services or enter into a contract with you to provide services, we will collect and use your Personal Data where necessary to enable us to take steps to offer you the services, process your acceptance of the offer and fulfil our obligations in the contract with you.

Legal obligation: We may need to use your Personal Data to comply with applicable legal requirements.

Vital interest: We may need to use your Personal Data to protect your life or in the event of a medical emergency.

Legitimate interest: We have a legitimate business interest in using your Personal Data to operate, improve, and market our business, websites, and services.

International Transfers of Your Personal Data

We may need to transfer your Personal Data to countries other than the country in which the data was originally collected for the purposes described in this Privacy Notice. When we do, if the applicable law requires, we use a variety of legal mechanisms to help ensure your rights and protections travel with your data, such as:

Internal Data Transfer Agreements: We ensure transfers between Citrin Cooperman entities are covered by agreements that incorporate prescribed contractual wording, such as the EU Commissioner’s Standard Contractual Clauses (SCCs), which contractually oblige each party to ensure that Personal Data receives an adequate and consistent level of protection.

Contracts (Master Service Agreements [MSAs (Master Service Agreement)], Engagement Letters, Statement of Work [SoW]): Where we transfer to or receive your Personal Data from third parties who help provide our products and services, we obtain contractual commitments from them to protect your Personal Data, which incorporate standard contract clauses (where required/applicable).

Mergers and Acquisitions

In the event Citrin Cooperman goes through a business transition, such as a merger, or the acquisition or sale of all or a portion of its assets, your Personal Data may be among the assets transferred.

How We Protect and Store Your Personal Data

Citrin Cooperman takes the protection of Personal Data very seriously and has in place several safeguards to protect the confidentiality and security of Personal Data. These safeguards include:

System-level restrictions for access to programs and data, such as appropriate password safeguards and secure sign-on mechanisms, such as dual authentication, are in place.

Restricted access to programs and data safeguards, such as user provisioning, deprovisioning, and recertification controls, are in place.

Role-based access to programs and data safeguards, including Privileged User Access controls, are in place.

Data minimization safeguards, including limiting access to Personal Data to authorized individuals are in place.

Data quality safeguards are in place to ensure the integrity of data, prevent errors, and improve the efficiency of data processing.

Encryption safeguards are in place to protect data in transit and at rest.

Logging and monitoring controls are in place to protect the integrity of Personal Data.

Citrin Cooperman also has several policies and procedures in place to govern the collection, use, share, sale, disclose, retention and disposal of Personal Data. These policies and procedures are designed to ensure that Personal Data is collected, used, and disclosed in a lawful, fair, and transparent manner. How long we retain your Personal Data depends on the purposes for which it was obtained and its nature. We will keep your Personal Data for the period necessary to fulfil the purposes described in this Notice unless a longer retention period is permitted or required by law and in accordance with the Citrin Cooperman Record Retention Policy.

Retention

How long we retain your Personal Data depends on the purpose for which it was obtained and its nature. This includes providing you with a service you have requested from us or to comply with applicable legal requirements, including complying with the law, retaining records, resolving disputes, and enforcing our agreements. This storage period may extend beyond the term of your relationship with us. We will keep your Personal Data for the period necessary to fulfil the purposes described in this Notice unless a longer retention period is permitted or required by law and in accordance with the Citrin Cooperman Record Retention Policy.

Your Data Protection Rights

You may have certain rights over your Personal Data that enable you to control the use of any Personal Data about you that we collect and use.

Right to Access. You may have the right under certain circumstances to request and receive a copy of your Personal Data, upon verifiable request.

Right to Data Portability. You may have the right under certain circumstances to request that your Personal Data be provided to you and/or transferred to a third party. To the extent it is technically feasible, we can provide your Personal Data in a structured, commonly used, machine-readable format, upon verifiable request. Note that this right only applies to automated information that you initially provided for our use or to perform a contract with you.

Right to Recertification (Correction). You may have the right to request corrections of your Personal Data, upon verifiable request where it is inaccurate or out of date.

Right to Be Forgotten (Right to Erasure). You may have the right under certain circumstances to have your Personal Data erased. You can request we delete Personal Data where you do not believe there is reason for us continuing to process it, or where you believe we collected or are using it unlawfully, where erasure is required by law or where you have opted-out of our processing, upon verifiable request. In certain cases, we may not be able to comply fully or at all with your correction request for legal reasons, and to the extent we are permitted to, we will notify you of the reasons.

Right to Opt Out of Sale/Sharing of Personal Data for Purposes of Targeted Advertising. You may have the right to opt out of Sale/Share, including Targeted Advertising by clicking [Opt-out of Sale/Sharing of My Personal Information \(including for Targeted Advertising\)](#). Please see our [Cookies and Other Tracking Technologies Notice](#) to better understand our use of cookies, as well as your rights involving cookies and other areas of automated collection.

Right to Object to Direct Marketing. You have the right to object to the use of your Personal Data for direct marketing at any time. If you wish to modify your preferences in respect to marketing updates or notifications, or the mailing lists to which you subscribe, you can modify your preferences using [this link](#). All commercial and marketing communications (e.g., notification emails and newsletters) include instructions for opting out of those communications.

Right to Withdraw Consent. You have the right under certain circumstances, such as where we rely on your consent to process your Personal Data, to withdraw your consent. However, this will not affect the lawfulness of any processing carried out before you withdraw your consent. If you withdraw your consent, we may not be able to continue to provide certain products or services to you. We will advise you if this is the case when you withdraw your consent.

Depending on your residency, you may be entitled to additional data rights. Please see [Jurisdictional/Territorial Privacy Notices](#) for a further understanding of your rights.

In certain cases, such as for legal reasons, we may not be able to comply fully or at all with your correction request, and to the extent we are permitted to, we will notify you of the reasons. You are not required to pay any charge for exercising your rights. To the extent any of the above rights are applicable and you would like to exercise your rights, please leverage our [Data Subject Access Request Form](#), or contact us by email at privacy@citrincooperman.com, or by phone at (888) 450-2221.

Exercising Your Data Protection Rights

Only you, or someone you have legally authorized to act on your behalf, can make a verifiable consumer request related to your Personal Data. You can also make a verifiable consumer request on behalf of your minor child. If you are making a request on behalf of someone else, we may ask for additional information to protect their Personal Data, such as proof that you are authorized to make the request. We will only use personal data provided in a verifiable consumer request to verify the requestors' identity or authority to make the request.

We cannot respond to your request, except for requests to Opt-out of Sale/Sharing of My Personal Data (including for Targeted Advertising or provide you with your Personal Data if we cannot verify your identity or authority to make the request, or if we cannot confirm that the Personal Data relates to you or your minor child. We may also be unable to comply with your request if we have a legal or regulatory obligation to keep your Personal Data, such as when the Personal Data is necessary to complete a transaction. Other reasons your request may be denied are if it jeopardizes the privacy of others or would be extremely impractical to honor.

Your request must:

Provide enough information so that we can reasonably verify that you are the person whose Personal Data we collected or received from an authorized representative.

Describe your request in enough detail so that we can understand, evaluate, and respond to it.

To the extent any of the above rights are applicable and you would like to exercise your rights, please leverage our [Data Subject Access Request Form](#), by email at privacy@citrincooperman.com, or by phone at (888) 450-2221. You are not required to pay any charge for exercising your rights.

Accessible Format

This Privacy Notice is available to individuals with disabilities. To access this Privacy Notice in an alternative downloaded format, please [click here](#).

Changes to This Notice

We may update this Statement occasionally. When we do, we will post the current version on this site, and we will revise the version date located at the top of this page. We encourage you to periodically review this Notice so that you will be aware of our privacy practices.