

# Whitaker & Associates, LLC

## Privacy and Confidentiality Policy

At Whitaker & Associates, LLC, privacy is our number one priority. The purpose of this policy and confidentiality statement is to establish how the firm, Whitaker & Associates, LLC, and its affiliates (“us,” “our,” or “we”) collect, use, store, or otherwise process personal information from clients and other individuals (collectively “you”) who access or use our websites [whitakerassociates.net](http://whitakerassociates.net) or [whitakerassociates.net/store](http://whitakerassociates.net/store) and/or any of our other products, or services that link to this Privacy Policy (the “Services”). By doing so, you understand that we will collect and use your personal information as described in this Privacy Policy. It also lends itself to confidentiality as well.

We believe that confidentiality is a close second to privacy and that they go hand-in-hand. Whether it pertains to a product or service that is either under patent and/or trade secret laws, confidential information can be described as and includes, but is not limited to the following: Invention description(s), technical and business information relating to proprietary ideas and inventions, ideas, patentable ideas, trade secrets, drawings and/or illustrations, patent searches, existing and/or contemplated products and services, research and development, production, costs, profit and margin information, finances and financial projections, customers, clients, marketing, current or future business plans and models, regardless of whether such information is designated as “Confidential Information” at the time of its disclosure. Any and all information obtained must be considered confidential and not be disclosed under any circumstances unless required to do so by law.

In addition, if internal information becomes known and is considered breaking news, or rumor or even speculation, it must not be disclosed, divulged or leaked for any reason. In any case, the information must still be considered confidential. As a consultancy, we gather client information for the purpose of providing a professional and reliable service. We have developed this Privacy Policy to inform clients of the firm’s privacy views and practices. This Privacy Policy is subject to change, so we recommend that you check back periodically if you have any questions.

When you become a client, you can be rest assured that we neither use nor sell your personal information (i.e., name, mailing address, email address and telephone number), which we regard as sensitive. This information is safeguarded and retained for future use. The nature of your business and the work that we perform is held in strict confidence and is not disclosed to anyone. The one exception would be where required by law or in response to legal processes, to protect the rights or property of the firm or to protect its safety our clients or others.

The firm’s core products and services assist clients in creating, completing, and displaying the validity of digital or electronic correspondence, such as electronically or digitally creating documents or missives that usually require a signature and follow-up.

In some instances, we may process your personal information because of an agreement with a third-party organization. In those cases, the terms of that agreement may dictate how we process your personal information. If you believe a third-party organization has asked us to process your personal information on their behalf, please consult with them in the first instance as they will be responsible for how we process your information. This Privacy Policy (“Policy”) does not apply to any third-party websites and apps that you may use, including those to which we link in our Services. You should review the terms and policies for third-party websites and apps before clicking on any links.

As part of our Services, clients request that we collect and record information that assists them in proving the validity of their queries, such as the names of the institution(s) who are directly involved in the transactions and what the issues entail. We recommend that you read this policy in full to ensure you are sufficiently informed about the manner in which we collect, use, store, or otherwise process your personal information as well as your privacy rights.

Whitaker & Associates, LLC also maintains a client database. As a consultancy, we reserve the right to contact our clients for our legitimate business needs, such as email and paper mailings regarding Whitaker & Associates, LLC’s products and services, or in fulfilling a project, assignment or task initiated by the client. If we were to process your personal data for another purpose, we’d first ask for your permission prior to taking any action. If you do not want to receive marketing materials from us, you can opt out at any time by simply clicking the ‘unsubscribe’ link in the email.

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We may employ contractors or other third parties to assist with our operations. We may give them access to databases of user information, so that they can perform their services for us, including performing system maintenance, displaying personalized content, performing list analysis, management or sending mailings for us from our advertisers. These parties are all subject to confidentiality agreements that restrict their use and disclosure of information they obtain through their relationship with the firm.