

## **Golden Planners Inc. Policy on the Collection, Use and Disclosure of Personal Information of Event Registrants**

Golden Planners Inc. (GPI), an Ottawa-based corporation, is a full-service bilingual (English and French) firm of meeting and communications professionals dedicated to providing high levels of service to its clients. GPI was federally incorporated in October 1989 and is managed by its President, Phil Ecclestone.

GPI has worked closely with a wide variety of clients (corporations, associations, not-for-profits and Canadian federal government departments) producing meetings and conferences, communicating client objectives and designing effective event programs since its inception.

GPI is dedicated to maintaining high standards of confidentiality with respect to the information that has been provided to us. This Policy Statement has been prepared to affirm our commitment to maintaining the privacy of those who register for conferences, meetings and events which we are contracted to organize and to inform you of our practices concerning the collection, use and disclosure of information provided to GPI.

Our obligations apply to all officers, employees, contractors and agents who provide services to or on behalf of GPI in connection with our delivery of products, services and information. Other applicable laws and internal GPI policies govern the protection of personal information of our employees.

GPI collects contact information about registrants through conference registration forms, available in a variety of formats, for a variety of clients' events including, but not limited to, conferences, workshops, tradeshows, meetings and special events. It does so to fulfill its contractual obligations. Completion and submission of the registration form is deemed to provide the registrant's consent to the client and/or GPI to collect the registrant's personal information associated with the registration in order to communicate with the registrant, process the conference registration and make any arrangements with third party service providers pertaining to the registrant's participation in the event (including the provision of this personal information necessary to complete your registration or any aspect of your participation).

Client events are sometimes supported by Preferred Suppliers, Sponsors and Exhibitors, to whom contact information may be made available at the direction of the client, provided registrant consent is obtained during the registration process.

The achievement of GPI's obligations involves, among other things, communicating with and determining the needs of registrants, processing payment relating to attendance at events or event related services and products, and, upon instruction from our clients, permitting the client's affiliated organizations, sponsors, exhibitors and/or suppliers to provide products, services and information to registrants.

For some events, a list of participants, including contact information, is produced and distributed to registrants. If a registrant consents, his/her contact information shall be used for these purposes. Contact information may include a registrant's name, title, department, firm, address, telephone number, fax number and email address as provided on the conference registration form. If a registrant

does not consent, then his/her contact information shall be used by GPI for purposes of communicating with the registrant only and shall not be provided to anyone else except the client. In the event a registrant does not complete the Collection, Use and Disclosure of Information Section, the submission of a conference registration form constitutes the consent of a registrant to the use of his or her contact information for these purposes.

As a general rule, all registration information is held in strict confidence and, except in limited circumstances, is not revealed to anyone unless expressly or implicitly authorized by the registrant. GPI does provide registrant contact information on a limited basis to third party organizations at the direct request of the client when the client has in place policies which respect to the following:

in the opinion of the client, such usage constitutes a service and the information is pertinent to the event's registrants; and

the client has the written agreement of a third party organization to adhere to specific requirements with respect to their use of such information.

There are circumstances where disclosure of personal information may be justified or permitted under a legal duty or right and GPI may disclose registrant information without consent. Personal information may include all information about registrants requested on the conference registration form. In such circumstances where, in the opinion of GPI, it is appropriate or necessary to disclose personal information, GPI will not disclose more information than is required.

GPI will retain personal information provided to it only for so long as it is required for the purposes stated above. Information about a former registrant is not actively maintained.

While specific responsibilities may be assigned to other members of GPI's staff, GPI's President is responsible for the administration of this Policy. In the event of any question concerning the access to or the accuracy, management or use of a registrant's personal information, members should address such questions to GPI's President, Phil Ecclestone.

GPI endeavours to maintain adequate physical, procedural and technical security with respect to our offices, information storage facilities and third party or subcontractor arrangements so as to prevent any unauthorized access, disclosure, copying, use, or modification of a registrant's personal information.

### **Visiting GPI Web Sites**

This privacy and security statement details how GPI deals with information, personal and otherwise, collected via our home web site: [www.goldenplanners.ca](http://www.goldenplanners.ca) and all the other temporary web sites (web registration sites) which we routinely set up to deal with attendance registrations and other related services for conferences, conventions and tradeshow (events) hosted by our various clients. These web registration sites may directly link with our clients' web sites and in fact appear to be part of our client's web site as part of a seamless link.

A visitor to GPI or GPI maintained web sites is not required to reveal any individually identifiable

information, such as name, address, or telephone number. Nor is such information collected passively by electronic means.

Information is collected when an individual voluntarily completes an online form related to the individual's participation in the event such as but not limited to conference registration forms, abstract and paper submission forms, exhibitor registration forms, and/or event product or service order forms. This information is collected, used or disclosed in a manner consistent with this policy statement.

Our Web server does not collect visitor information in the form of the visitor's domain or Internet Protocol (IP) address.

Individuals who wish to do business transactions are requested to supply one or more items of data within the following classes of information:

- Corporate Identification Information
- Personal Identification Information
- Financial Information (e.g. credit card information, purchase order numbers or any other payment information for billing purposes); and
- Delivery Information

This information is collected for billing and delivery purposes as well as to permit us to contact the registrant with respect to actions taken by us to complete the order.

If an individual purchases conference registration(s) or documents through these web sites using a credit card, the credit card information is used only for credit card processing purposes.

For the transfer and receipt of certain types of sensitive information such as financial information, visitors will be re-directed to a secure server and will be notified through a pop-up screen on the site.

In browsing the Internet, you will encounter a technology called "cookies" which can be used to provide you with specific information from a web site as well as provide the operator of a web site with information about you. GPI Websites do not use cookies.

## **Evolving Practices**

This Policy is in effect as of January 1, 2004 and was most recently updated on January 27, 2017. GPI may, from time to time, review and revise its privacy practices and this Policy. In the event of any amendment, a notice will be posted on [www.goldenplanners.ca](http://www.goldenplanners.ca) or on the GPI managed sites and published in appropriate event publications. Policy changes will apply to the information collected from the date of posting to the web site as well as to existing information held by GPI.

## **Questions**

If you have any questions or concerns regarding this Policy or GPI's privacy practices, please contact:

Phil Ecclestone  
President  
Golden Planners Inc.  
Suite 310, 1390 Prince of Wales Drive  
Ottawa, ON K2C 3N6  
Tel: 613-241-9333  
Fax: 613-565-2173  
Email: [ecclestone@goldenplanners.ca](mailto:ecclestone@goldenplanners.ca)