

CFA SOCIETY HOUSTON PRIVACY POLICY

This privacy policy ("**Privacy Policy**") describes how CFA Society Houston (the "Society") gathers and protects certain individually identifiable information ("**Personal Information**") and how the Society may use, process, transfer and share Personal Information. The Society, located at P.O. Box 32, Bellaire, Texas 77402, controls the content of this website www.cfahouston.org. This Privacy Policy applies to Personal Information that we collect through the Site, as well as offline collections of Personal Information about Society members ("**Members**"), CFA Institute members and candidates, and attendees at Society events and purchasers of Society products and services.

SUMMARY OF KEY POINTS

- We collect Personal Information when you provide information to the Society through the Site or through other communications with CFA Institute or the Society. To learn more about the information that the Society collects, [click here](#) to learn more.
- We use Personal Information to provide CFA Institute and/or the Society products and services to you. For example, we collect Personal Information to establish and maintain the Society memberships. [Click here](#) to learn more.
- We share Personal Information with exam preparatory providers, and the CFA Institute and its partners and/or Society's partners which provide products or services that may be of interest to you. To learn more about your rights to opt out of such disclosures, [click here](#).
- Your use of the Site or provision of Personal Information constitutes your consent to the processing and transfer of your Personal Information as described in this Privacy Policy. [Click here](#) to learn more.

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Consent

Your use of the Site or provision of Personal Information to the Society constitutes your consent to the processing and transfer of your Personal Information in accordance with this Privacy Policy. *For US Societies:* If you are located in a country other than the United States, you consent to the transfer of your Personal Information to the Society in the United States, to third parties located in the United States as determined by the Society, and to local the Society Member Societies and third parties in other countries as determined by the Society, in accordance with this Privacy Policy. Such countries may not provide a level of data protection to your Personal Information equivalent to that provided by your home country. To the extent that you provide "sensitive" Personal Information, such as information about ethnic or racial origin, religious or philosophical beliefs, and/or health or medical conditions to the Society, doing so constitutes your consent to the collection, use, transfer and sharing of such information for the purposes described in the record where you provide the information and in this Privacy Policy.

The Information We Collect

We collect Personal Information to help us better understand your needs, to provide you with personalized and efficient service, and for other purposes described in this Privacy Policy. We generally obtain Personal Information directly through the information that you provide to CFA Institute and/or the Society.

Information you provide to the Society

You may provide Personal Information to the Society in a number of ways, including: (1) through your use of the Site, such as registering for an account and signing up to receive newsletters; (2) through your online account with the Society/ CFAI; (3) upon becoming a Member; (4) upon communicating directly with CFA Institute and/or the Society either electronically or by providing hard copies of documents; and (5) upon registering for the CFA or CIPM exam, or for CFA Institute or Society conferences or events.

The Personal Information that we collect may include: your full name, business address, home address, e-mail address, telephone number, credit card number, [passport number, national ID, driver's license,] education, job description, employer, [criminal history, medical or health information, gender, religious/philosophical beliefs, marital status] and date of birth.

How We Use Information

The Society may use Personal Information to provide you with CFA Institute and/or Society products and services and inform you about other products and services that may be of interest to you. In particular, we may use your Personal Information to:

- establish and maintain your Society membership;
- process applications that you submit to the Society;
- register you for CFA Institute and/or Society programs and events;
- process orders that you place with the Society;
- correspond with you regarding examinations, events or other CFA Institute and/or Society-related products or services;

The Society may also send you Society newsletters and other informational materials that may be of interest to you. We will provide you the opportunity to opt out of receiving such information in each such communication.

How We Share Information

The Society may share Personal Information as follows:

Third Party Processors and Transaction Processing

We may engage third parties to perform services in connection with the operation of this Site and our organization. Examples of these third parties may include website hosting service providers, technology service providers, payment processors, legal advisors and consultants, examination supervisors and/or related services. We may share Personal Information with these third parties, but we authorize them to use this Personal Information only in connection with the services they perform on our behalf. Such parties are bound by contract to establish reasonable measures to protect your Personal Information from unauthorized access, use or disclosure. In addition, we may share certain Personal Information with third parties as necessary to facilitate our offering of products and services to you.

Third Party Products and Services

We may share Personal Information with select third parties that offer services or products that we believe may be of interest to you. These third parties may contact you with communications regarding their own services or products. Such third parties may include exam preparatory providers, exhibitors at Society events, other Society partners. If you prefer that the Society no longer share your Personal Information with such third parties, you may opt-out at any time by sending a written request in which you identify yourself, and which clearly states your preference that the Society not release your information to one or more of the individuals or entities described herein. The request may be sent to: office@cfahouston.org.

Society Member Directories

The Society may make Member name, location and charter status information available to other Society members and certain purchasers through the Society's Member Directory. Members may choose to make additional information available on the Member Directory by changing their account preferences.

For some Society events, we may make certain Personal Information of all event attendees available to other event attendees. The Personal Information made available may include name, employer, city, state and/or country and, if you opt-in to participate in an attendee portal, email address.

Legal Compliance

The Society may share Personal Information as required by law or at the request of government regulators or other law enforcement officials and the courts.

Society Networking Sites and Social Media Sites

The Site may offer opportunities to engage in social networking, interact with others and/or submit or post messages or other content, such as on Society blogs, LinkedIn, Facebook, and Twitter. The Site may also provide for interactions with third party websites or services including social media websites through plug-ins. [Please note that any information or materials that you post or submit through such Society Networking Sites will be publicly posted to everyone that has access to the relevant site.] Posts to third party social media or other sites ("**Social Media Sites**"), including any content on our Site that you "share" or "like," will be controlled by and subject to the terms of such social media or other sites. We encourage you to use caution when you submit any information or materials on or through any Society Networking Site or interact with third party websites or services through plug-ins.

Your Preferences

You may change your account preferences at any time by editing your account through the Society's Site www.cfainstitute.org or by contacting us using the information provided under the "Contact Us" section of this Policy.

In order to provide you with superior service, we may contact you to resolve a problem even if you have asked us not to contact you for other purposes. For example, if you are a Member and we cannot deliver your Annual Dues Bill, we may contact you to verify delivery details.

Accessing and Updating Personal Information

You may request access and the opportunity to modify your Personal Information to the extent required by applicable law by contacting the Society as described in the "Contact Us" Section at the end of this Privacy Policy. Please note that we may require additional information to authenticate your identity.

Security

The Society maintains reasonable and appropriate technical, physical and administrative measures to protect the security of your Personal Information. Access to Personal Information is limited to only those employees, contractors or authorized agents of the Society who have authorization to access such Personal Information and such access is limited to the extent such information is needed to fulfill the task for which the Personal Information was collected. While we strive to protect your Personal Information, we cannot ensure the security of the information you transmit. We recommend you to take every precaution in protecting your Personal Information when you are on the Internet. For example, change your passwords often, use a combination of letters and numbers when creating passwords, and make sure you use a secure browser.

Links

This Site provides links to websites or services created and maintained by other individuals or organizations. Please note that these websites' privacy policies may differ from this Privacy Policy. We encourage you to read the privacy statement of any website you may visit, as we are not responsible for such websites' content and policies. The Society does not control these links or sites nor is the Society responsible for the accuracy, timeliness, security, or continued availability or existence of the information provided on these sites. Other organizations linked from the Site may collect information about you when you visit their websites. The Society cannot control this collection of information. You should contact these companies directly if you have any questions about how they use the information they collect.

Children

The Society does not knowingly collect any personal information from children under the age of 13, and users under the age of 13 should not submit any personal information to the Society.

Changes to This Policy

If we make any material changes to our privacy practices we will post a prominent notice on our website notifying users of the change.

Contact Us

For further information about the Society's privacy practices, please contact:

Mailing Address: PO Box 32, Bellaire, TX 77402

Phone: 713.877.1838

Email: office@cfahouston.org

Last Policy update: 02/01/2015