

## SuccessionHR Privacy Policy

Last Updated: **January 1, 2023**

Succession HR Inc. (“SuccessionHR,” “we,” “us,” or “our”) recognizes the importance of privacy to our customers. This Privacy Policy describes the manner in which we treat our customers’ employee personal information, as well as the personal information we collect, such as through our website, <https://www.successionhr.com/> (the “Website”).

### COLLECTION AND USE OF PERSONAL INFORMATION

SuccessionHR offers succession planning and human resource management software through which personal information can be uploaded about an organization’s employees (“Employees”), including names, addresses, contact information. Our customers choose the types of Employee personal information that may be uploaded into our software. We do not collect or use the Employee personal information of our customers for any purpose other than to provide the services or as otherwise agreed to by our customers.

We may otherwise collect and use personal information when you:

- **Request a Demo:** When you request a free demo, we may collect your name, job title, email address and certain information about your company. We use this information to contact you and otherwise facilitate your free demo.
- **Sign-up for Newsletters:** When you sign-up to receive mail or e-mail regarding our products and services, we will collect information such as your name, mailing address or email.
- **Make a Purchase:** If you choose to purchase SuccessionHR services, we may collect your payment information, such as your name, address, phone number, email address, billing address, and payment card information. This information is used to process and fulfill your order.
- **Submit a Job Applications:** If you apply for a job at SuccessionHR, you may provide us with certain personal information about yourself, such as that contained in a resume, cover letter, or similar employment-related materials. We use this information for the purpose of processing and responding to your application for current and future career opportunities.
- **Participate in Surveys or Promotions:** We may also ask you for information, such as your name and email address, when you enter a contest or promotion sponsored by SuccessionHR or participate in one of our surveys or other forms of customer research. The information we collect from these contests, promotions and surveys may be used by us to facilitate your participation in the contest, promotion, survey or customer research and to improve our overall customer experience by helping us understand our customers.
- **Contact Us:** When you contact us with a comment, question or complaint, you may be asked for information that identifies you, such as your name, address and a telephone number, along with additional information we need to help us promptly answer your question or respond to your comment. We may retain this information to assist you in the future and to improve our customer service, service offerings, and our Website.

### DISCLOSURE OF PERSONAL INFORMATION

We will not disclose, trade, rent, sell or otherwise transfer personal information, without consent, except as otherwise set out herein.

We may transfer or disclose personal information as follows:

- **To Provide the Services:** In connection with the services we provide to our customers, we may disclose personal information to other third parties at the request of our customers.
- **Service Provider Arrangements:** In connection with our Website or the services we provide to our customers, we may transfer (or otherwise make available) personal information to third parties who provide services on our behalf. For example, we may use service providers to process payments, host our website and store information on our behalf. Our service providers are given the information they need to perform their designated functions, and we do not authorize them to use or disclose personal information for their own marketing or other purposes. Personal information may be maintained and processed by third party service providers in the US and Canada and may be accessed by the courts, law enforcement and national security authorities as required under the laws of those jurisdictions. For more information about the way in which our service providers treat personal information, contact us as set out in the “Contact Us” section below.
- **Sale of Business:** SuccessionHR may transfer personal information as an asset in connection with a merger or sale (including transfers made as part of insolvency or bankruptcy proceeding) involving all or part of SuccessionHR or as part of a corporate reorganization or other change in corporate control.
- **Legal:** SuccessionHR and our Canadian, US and other affiliates may provide personal information in response to a search warrant or other legally valid inquiry or order, or to an investigative body in the case of a breach of an agreement or contravention of law, or as otherwise required or permitted by applicable Canadian, US or other law. Where a disclosure of our customers’ information is required by applicable law, we promptly notify our customer prior to complying with such requirements (to the extent we are not prohibited from doing so). We may also disclose personal information where necessary for the establishment, exercise or defence of legal claims and to investigate or prevent actual or suspected loss or harm to persons or property.

## INFORMATION ABOUT OUR WEBSITE

**Visiting our Website:** We collect the IP (Internet protocol) addresses of all visitors to our Website and other related information such as page requests, browser type, operating system and average time spent on our Website. We use this information to help us understand our Website activity, and to monitor and improve our Website.

**Cookies:** Our Website uses a technology called "cookies". A cookie is a tiny element of data that our Website sends to a user’s browser, which may then be stored on the user’s hard drive so that we can recognize the user when they return. We use cookies to remember your preferences and to authenticate you. You may set your browser to notify you when you receive a cookie or to not accept certain cookies. However, if you decide not to accept cookies from our Website, you may not be able to take advantage of all of the Website features.

**Advertising:** We may use third parties to serve our advertisements on other websites. These advertising companies may use cookies to collect information (such as web pages you visit and your response to ads) when you visit our Website and use that information to serve advertisements tailored to your interests on our Website or other third-party websites. To learn more about this behavioural advertising practice or to opt-out of this type of advertising, you can visit <http://youradchoices.ca/choices/>.

**Third Party Links:** Our Website may contain links to other websites that SuccessionHR does not own or operate. Also, links to our Website may be featured on third party websites on which we advertise. Except as provided herein, we will not provide personal information to these third parties without consent. We provide links to third party websites as a convenience to the user. These links are not intended as an endorsement of or referral to the linked websites. The linked websites have separate and independent privacy policies, notices and terms of use. We do not have any control over such websites, and therefore we have no responsibility or liability for the manner in which the organizations that operate such linked websites may collect, use or disclose, secure and otherwise treat personal information.

## **SECURITY OF PERSONAL INFORMATION**

We understand that data security is a critical issue for our customers and we are committed to safeguarding the personal information in our custody and under our control. We have implemented reasonable administrative, technical and physical safeguards in an effort to protect against unauthorized access, use, modification and disclosure of personal information in our custody and control.

## **ACCESS TO PERSONAL INFORMATION**

If we receive a request from an individual to access or update personal information we have collected on behalf of a particular customer, we will direct that individual to the relevant customer. We will assist our customers wherever possible in responding to individual access requests.

If you submit personal information via our Website or otherwise provide us with your personal information, you may request access, updating or correction of your personal information by submitting a written request to our Privacy Officer (see “Contact Us” below). We may request certain personal information for the purposes of verifying your identity.

## **CHANGES**

This Privacy Policy may be updated periodically to reflect changes to our personal information practices. The revised Privacy Policy will be posted on the Website. We strongly encourage you to please refer to this Privacy Policy often for the latest information about our personal information practices.

## **CONTACT US**

Please contact us at the address set out below if:

- you have any questions or comments about this Privacy Policy;
- you wish to access, update, and/or correct inaccuracies in your personal information; or
- you otherwise have a question or complaint about the manner in which we or our service providers treat your personal information.

[support@successionhr.com](mailto:support@successionhr.com)

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