

ESTATE MATTERS INC. PRIVACY POLICY

Estate Matters Inc. and its Division, Caring Matters hold the privacy of your personal information very seriously and will use your information only in accordance with the compliance of your instructions to us. There may be limited circumstances in which some of your information will be shared with third parties, under strict restrictions, and when so doing, we will let you know in advance and explain the need to doing so. If you have any questions or concerns regarding our methods of operation, please discuss them with us, and we will do our very best to alleviate your hesitation in allowing us to help you.

How we collect and use your information.

Information will be collected and used to provide advice to our clients to help with their decision making purposes. It is understood that the information being provided is for the sole use of organizing and advising on care and estate matters pertaining to a client or the person who they have been legally designated to represent in their capacity as the Power of Attorney or Estate Trustee. This policy allows us, when authorized by you, to speak with and collect information on your behalf from a third party. This could include, but is not limited to, lawyers, real estate agents, financial planners, caregivers. Any associates who represent our company understand that information is to be kept confidential and to be used only for the purposes which it has been intended.

What we will not do with your information.

We will not sell client information. We will also not share this with organizations that are not related to our client care plan or that would use this to contact you regarding their own services.

Protecting your information.

We will never knowingly use personal information that is shared by our clients inappropriately. It is understood that the information being provided is for the sole use of organizing and advising on matters pertaining to a client's care plan or the care plan for the person who they are legally representing in their role as a Power of Attorney or Estate Trustee. We will keep our records as accurate as possible based on the information that is provided to us. Your consent to maintain and use this information may be withdrawn however this could impact our ability to service your needs.

Making contact

We will use the contact methods that you have provided to us to contact you during the course of doing business. These may include phone, email, or fax. To change the way that we communicate with you, please contact us.

Our Privacy Officer:

Sherri Auger

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