

Family Firm Institute, Inc. (FFI) Privacy Policy as of May 25, 2018

How do we collect information about you?

We collect information that you provide by filling in forms which are provided directly by us or found on our website, www.ffi.org, www.ffi practitioner.org, and www.ffi gen.org. This includes information provided at the time of your applying to become a member of FFI, enrolling in a Global Education Network (GEN) course, posting material, or enquiring about further services such as requesting to attend FFI's events and/or conferences. Website usage information is collected using cookies.

What information do we collect about you?

- your name and email address
- if provided by you, your employer, your job title and/or position; your preferred mailing address, phone number and website information
- if you are making purchases from us for memberships, course enrollments, event attendance or other goods or services, financial information, including information necessary to make or receive payments to and from you and for the purposes of fraud prevention;
- details of your correspondence, communications and connections with our staff; and
- any information which is provided to us by you or on your behalf.

How will we use the information about you?

For FFI Members

We process information about you to initiate your membership, manage your account, and to keep you informed about FFI and our services that may be of interest to you and relevant to your membership. We process data for purposes necessary for the performance of services to you pursuant to your membership agreement with FFI and to comply with our legal obligations.

For Non-Members

We process your personal data for the purposes of our own legitimate interests. These legitimate interests include:

- promoting FFI
- inviting you to events, seminars, webinars and meetings
- developing and maintaining relationships with you as a potential member of FFI or attendee at FFI events
- managing and administering our relationship with our business contacts
- sending you marketing material, newsletters, updates and other information; and
- monitoring and analyzing your reception of, and interest in, material we send you.

When we process your information based on our legitimate interests, we make sure to consider and balance any potential impact on you and your data protection rights.

We also may process your personal data for certain additional purposes with your consent, and in these limited circumstances where your consent is required for the processing of your personal data, then you have the right to withdraw your consent to data collection for such specific purposes.

We will use your information collected from the website to personalize and improve your repeat visits and for statistical analysis.

What security measures are in place?

FFI, YourMembership, and Thought Industries use industry-standard SSL certificates to encrypt website traffic to safeguard all data sent and received through www.ffi.org, www.ffipractitioner.org and www.ffigen.org.

Data retention

In the case of FFI Members, we will keep information processed in providing services to you under your membership agreement for a period of at least six (6) years after termination of membership.

In the case of non-FFI Members, we will keep information processed in connection with our legitimate interests, as described above, for a period of at least six (6) years after collection. If you wish to opt out of receiving marketing emails, newsletters or other such communications, you may do so at any time by emailing us at ffi@ffi.org.

If legally required, FFI may retain your details for longer periods.

Marketing

We would like to send you information about FFI and our services that will be of interest and benefit to you. If you have consented to receive marketing, you may opt out at any time. You have a right to stop us from contacting you for marketing purposes. If you no longer wish to be contacted for marketing purposes, please click unsubscribe from the Mail Chimp emails that are sent to you.

Access to your information and correction

You have the right to request a copy of the information that we hold about you. If you would like a copy of some or all your personal information, please email or write to us at ffi@ffi.org or at Family Firm Institute, 200 Lincoln St., #201 Boston MA 02111. Depending on the extent of the request, we may make a small charge for this service. We want to make sure that your personal information is accurate and up to date. You may ask us to correct or remove information you think is inaccurate.

Cookies

Cookies are text files placed on your computer to collect standard internet log information and visitor behavior information. This information is used to track visitor use of the website and to compile statistical reports on website activity.

FFI's website – www.ffi.org – is powered by YourMembership. Please see YourMembership's cookie information at <https://www.yourmembership.com/legal/> for further information regarding the use of cookies on FFI's website.

FFI GEN website – www.ffigen.org – is powered by Thought Industries. Please see Thought Industries' cookie information at <https://www.thoughtindustries.com/privacy-policy> for further information regarding the use of cookies on the FFI GEN website.

For further information visit www.aboutcookies.org or www.allaboutcookies.org. You can set your browser not to accept cookies and the above websites tell you how to remove cookies from your browser. However, in a few cases some of our website features may not function as a result.

Other websites

Our website contains links to other websites. This privacy notice only applies to this website so when you link to other websites you should read their own privacy notices.

Changes to our privacy notice

We keep our privacy notice under regular review, and we will place any updates on this web page. This privacy policy was last updated on May 25, 2018.

How to contact us

Please contact us at ffi@ffi.org if you have any questions about our privacy notice or information we hold about you.

Please note that this policy is in addition to the privacy policies maintained by YourMembership (<https://www.yourmembership.com/legal/>) and Thought Industries (<https://www.thoughtindustries.com/privacy-policylink>), which host our database and GEN certificate program respectively.