

Collecting Personal Information

At Concept Professional Group Inc., we collect personal information to better serve your needs. In order to provide you with an array of services, products and promotions, we may collect the following information when necessary:

General Bookkeeping/Accounting Clients:

- Contact and mailing information such as name, address, telephone numbers, fax numbers, email addresses and Social insurance numbers;
- Employment or corporation information;
- Personal and/or corporate tax information.

Financial Advisor Clients:

- Financial information and statements, credit information;
- Mortgage and income tax information; Budgets, planned giving and legacy requirements;

We may also access information concerning your insurance policies directly with the Insurance Companies or Investment Companies that provide service to you.

Insurance Advisor Clients:

- Existing insurance policy information;
- Basic information collected may be provided to a third party medical service so they can contact you to arrange any underwriting requirements;
- These requirements are sent directly to private labs and the insurance company that will underwrite your application;
- We do not receive or maintain copies of this medical information;
- We will maintain an internal database on our server to record underwriting follow-up, conversations we may have concerning your application and future notes as they pertain to policy service;

We may also access information concerning your insurance policies directly with the Insurance Companies or Investment Companies that provide service to you.

We may need to collect other personal information depending on the circumstances, but we will ask you directly and ensure you agree.

Safeguarding Your Personal Information

At Concept Professional Group Inc. we value your personal information. Part of valuing your personal information is making sure that it is protected and kept confidential. We achieve this by:

- Keeping our records in locked cabinets.
- Having up to date computer security such as passwords, encryption and firewalls.

Where third parties are hired to assist us with providing products and services to you, we have them sign a privacy and confidentiality agreement to ensure that your personal information is protected by them.

Updating Your Personal Information

Concept Professional Group Inc. will do its best to ensure that your personal information is correct and kept current. A staff member will contact you to verify your personal information before any decisions are made or action is taken based on that information.

We will keep your information as long as necessary to continue to meet your customer needs and any legal requirements we may have. However, once your personal information is no longer needed, we will destroy it.

If your personal information changes, please inform us of the change and any other information you feel is necessary. Also, if your personal information is incorrect, please notify us of the correct information.

Controlling Your Personal Information

We believe that part of establishing trust and integrity comes from allowing you to control your own personal information.

As such, we will collect information about you on a voluntary basis. However, in some circumstances before we collect personal information from you, we will have you complete a consent form which authorizes our collection, use and disclosure of your personal information.

If you have questions or concerns about handling of your personal information or wish to withdraw your consent, please contact us at Concept Professional Group Inc. .



Accessing Your Personal Information

Concept Professional Group Inc. provides you with the opportunity to access your personal information that is held by us. It is our policy to ensure that customers receive a complimentary copy of all their documents to keep in their own personal file.

If you have more questions about your privacy rights in Alberta, please visit the website of the Office of the Information and Privacy Commissioner at <http://www.oipc.ab.ca>