

CFO Intelligence LLC - Privacy Policy

Welcome! Your use of the CFO Intelligence LLC (the “Company”) website located at <https://cfointell.com> (the “Website”), the Community application (the “App”), and any other websites or applications utilized by the Company, and the services collectively made available through same including all of our electronic publications such as CFO Wise, CFO Intelligence, our newsletters, and any other electronic publications (collectively, the “Digital Services”) are subject to this privacy policy (the “Privacy Policy”). If you do not understand or have questions about the Privacy Policy, immediately stop all use of the Digital Services. If you do not accept this Privacy Policy, you may not use the Digital Services. If at any time you do not agree to this Privacy Policy, you must cease your use of the Digital Services.

The Company (“we” or “us” or “our”) is committed to taking reasonable steps to protect your privacy online and manage your information responsibly. This Privacy Policy is intended to notify you of our online privacy practices, the type of information that may be collected and stored, how the information is used, with whom the information may be shared, what choices are available to you regarding the collection, use and distribution of the information, what kind of security procedures are in place to protect the loss, misuse or alteration of information under our control, and who to contact with questions or concerns.

This Privacy Policy does NOT apply to other websites to which we may otherwise link, or to other companies, third-party vendors who provide services to us, or entities who might be listed as third-party contacts on the Digital Services, each of which may be governed by their own privacy policies. This Privacy Policy also does not apply to information we may obtain from other sources about you. By using the Website and/or by contacting us and providing any personal information, you consent to the collection, transfer, storage, disclosure and use of information by us in accordance with this Privacy Policy. If we decide to change our Privacy Policy, we will post those changes on this page.

Please do not visit or use the Website or otherwise access the Digital Services from the European Union or European Economic Area, or anywhere else whose laws may conflict with this Privacy Policy; neither the Website nor access to the Digital Services is intended for your use if you are attempting to use from any of these countries and you do not have permission to use same. Please note that this exclusion is solely because the laws of your country may not conform with our policies as set forth in this Privacy Policy.

Why We Collect Information

We collect personal information because it helps us provide and improve our services, and to allow us to better serve our customers. In addition, your personal information helps us communicate to you our latest services and information and events about which you might like to hear. We also may correlate your personal information with information from other sources. For example, we may cross-check the personal information you provide to us against information that might be otherwise available through other entities in order to prevent or detect fraud.

How We Collect Information

We collect information in three primary ways:

1. **You Give Us Information:** We collect information from you when you submit it to us through our Website or the App, when you become a Subscriber or a Member of the CFO Intelligence Community, when you Register for an Event through the Website, when you complete a Survey, when you engage in our Marketplace, when you complete a form on our website or in the App, when you submit any information through our Blog, when you provide it through our “Contact Us” page, or contact us via e-mail, when you provide it to us on a phone call or when you otherwise provide it to us in person or in writing through the Digital Services, or otherwise. We also collect information from you when you contact our customer service.
2. **We Collect Information Automatically:** We automatically collect certain types of information when you visit our Website or the App. For example, we automatically collect various types of technical information when you use our Website and as otherwise described in this Privacy Policy.
3. **We Collect Information from Other Sources:** We may obtain information about you from outside sources. For example, we may obtain commercially available information about you from third parties, from publicly available sources, or purchase e-mail lists or other information from third parties for advertising and marketing purposes. We may also receive information from third-parties who provide services for us through web-beacons and other technologies as otherwise discussed in this Privacy Policy.

Please do not supply the following to us:

- Any other person's personal data, unless the Company explicitly asks you to do so;
- Any categories of your personal data that have not been explicitly requested by the Company;
- Any confidential, proprietary, secret or legally protected information which you are not explicitly requested by the Company to provide; and
- Any confidential, proprietary, secret or legally protected information which are under any legal obligation to not provide to or share with the Company.

What Information We Collect

We may collect, store and use the following kinds of personal data:

- Information required by the Company to for you to become a Subscriber or a Member of the CFO Intelligence Community, when you Register for an Event, when you complete a Survey, when you engage in our Marketplace, when you complete a form on our website or in the App, when you submit any information through our Blog, when you provide it through our “Contact Us” page, or otherwise provide it to us in person or in writing through the Digital Services or otherwise, or for us to provide and deliver our services, including

name, phone number, physical address, fax number, e-mail address, employment history and areas of professional expertise, or any other information required to allow us to respond to your inquiries, and address concerns you may have.

- Contact information if you sign up for any publications.
- Information that you provide seeking employment through the Website.
- Information you provide to us through our Blog or our “Contact Us” page.
- Information you provide at or through any Event for which you Register and/or attend.
- Information about your visits to and use of the Digital Services, and any information you provide to us via the Digital Services or through social media.
- Information you provide when you subscribe to one of our publications, including digital-only publications.
- Information when you make a purchase through us.
- Information contained on a business card or on any other document or information you provide to us.
- Information you provide when you update your information, either directly or through any of our technology, systems or otherwise.
- Information you may provide when seeking to purchase services from us or through us from a third party.

Even if you do not submit personal information through the Digital Services (but visit same), we may gather navigational information about where visitors go on the Website or use the Digital Services, and information about the technical efficiencies of our Website and services (i.e., time to connect to the Website, time to download pages, etc.). Collecting this information allows us to see which content and/or information on our Website or in connection with our Digital Services are most visited and helps us better understand the user experience. Additionally, collecting this information helps us improve the quality of the Digital Services by recognizing and delivering more of the features, content and/or information, and services our visitors prefer. In this process of gathering information, we may collect personally identifiable and non-personally identifiable information (for example, domain type, browser type and version, service provider and IP address, referring/exit pages, operating system, date/time stamp, and click-stream data).

We may also create and use electronic records to compile statistics about how our visitors collectively interact with our Website.

Finally, though payment information may be collected through the Website in connection with our services, such information is provided to, and received by, a third-party service provider. The Company does not receive or retain any of your bank account, credit card, or other financial or similar payment information.

Use of Cookies:

Cookies are bits of electronic information that a website may transfer to a visitor's computer to identify specific information about the visitor's visits to the Website. The Website may use a browser feature known as a cookie, which assigns a unique identification to your computer. Cookies are typically stored on your computer's hard drive and are used to help track clicks as you go through the pages within our Website. We may also use cookies to tell us whether you have previously visited the Website. We also may use cookies which may be set by third-parties with whom we have entered into agreements which may enable us to obtain analytics information about the use of our Website. You can set your browser not to accept cookies or to notify you when you are sent a cookie, giving you the opportunity to decide whether or not to accept it. You may also use commonly available tools in your browser to remove cookies which may have been placed onto your computer. To learn more about cookies, please visit <http://www.allaboutcookies.org> and <https://www.allaboutcookies.org/mobile/> (mobile devices).

Managing Cookies

- Most browsers allow you to refuse to accept cookies and to delete cookies. The methods for doing so vary from browser to browser, and from version to version. You can however obtain up-to-date information about blocking and deleting cookies via these links:
- <https://support.google.com/chrome/answer/95647?hl=en> (Chrome);
- <https://support.mozilla.org/en-US/kb/enable-and-disable-cookies-website-preferences> (Firefox);
- <http://www.opera.com/help/tutorials/security/cookies/> (Opera);
- <https://support.microsoft.com/en-gb/help/17442/windows-internet-explorer-delete-manage-cookies> (Internet Explorer);
- <https://support.apple.com/guide/safari/view-a-privacy-report-ibrw35004465/mac> and <https://support.apple.com/guide/safari/prevent-cross-site-tracking-sfri40732/14.0/mac/11.0> (Safari); and
- <https://privacy.microsoft.com/en-us/windows-10-microsoft-edge-and-privacy> (Edge).
- Blocking some or all cookies will have a negative impact upon the usability of many websites, including our Website and our services.

Use of Web Beacons, Clear-GIFs, Pixel Tags and JavaScript:

We also may use "pixel tags" (also called "action pixels," "web beacons" or "clear gifs") and/or JavaScript plug-ins, placed on our Website and in our emails to you. These web beacons and plug-ins are small graphic images (typically that you cannot see) or code on a website or in an email message which are used for such things as recording webpages and advertisements clicked-on by a user, or for tracking the performance of email marketing campaigns. These devices, if used, help

us analyze our users' online behavior and measure the effectiveness of our website and our marketing. We may also work with third-party service providers that help us track, collect, and analyze this information. Third-party entities with whom we have agreements may place these devices on the website and/or in emails to use information obtained from them such as pages viewed, items purchased, emails opened and items upon which you may click in emails. These third-party providers may also place cookies onto your computer. Those third-party cookies may enable us to obtain aggregate demographic information and user statistics about you and your preferences from these third-party sources as well as our information we have about you.

Device Identifiers:

A "device identifier" is a mechanism whereby we may automatically collect an IP address, mobile advertising identifier or other unique user identifier information for the computer, mobile or other device being used to access the Digital Services or third-party websites to which we may link for advertising purposes. A device identifier attaches a number that is automatically assigned to your computer or device that identifies it, similar to a cookie. We may use the device identifier to administer the Digital Services, help diagnose problems, analyze trends, track a user on the Website, identify a user shipping cart or purchase preferences, deliver advertising or obtain general demographic data. Most computers and mobile devices will allow you to turn off, block or delete device identifiers.

Server Logs:

A web "server log" is a record of activity created by a computer that delivers certain webpages to your browser. Certain activities that you perform on our Website may record information in server logs. For example, if you enter a search term into a search box located on the Website, the server log may record the search term, the link you clicked on to bring you to our Website and/or information about your browser, such as your IP address and the cookies set on your browser.

Social Media Platforms:

We may link to certain Company social media platforms on Twitter®, Instagram®, LinkedIn®, YouTube® or other platforms to which we link or operate. When you engage with our content at or through these social media platforms, you may be asked to share certain information about these interactions with us. Please review the privacy policies/notices and privacy settings with each such social media platform you use so you understand how this data and information may be used, and to choose your options for the sharing of such data and information.

How We Use the Information We Collect

We use the information we collect in a variety of ways. Generally, using all of the above mentioned, and similar type tools, we may collect, aggregate, and use de-identified information from or about you such as data about the type of browser and operating system used, your geographical location, which webpages and social media pages you view, the time and duration of your visits to and use of our Website, and any other submissions you may make, whether you clicked on any items or links on the Website, whether you have clicked on any links in any emails

sent from us, or third-parties on our behalf, whether you have chosen to opt-out of certain services or information sharing, and whether you have viewed or ordered certain products or services. We may also use this information to respond to inquiries you have made, to provide information you have requested, or to address any issues you have raised.

We may provide information about you that we have collected through the Digital Services to our Event Intell Partners, Company Intell Partners or Sponsors to improve our services for you, to you, and to allow you to receive information and content in which we believe you may be interested.

We may also use the information we collect internally in our business (and with our independent contractors providing services to us) for many business purposes, such as to: (i) provide the services you may seek; (ii) analyze trends and conduct research; (iii) provide support and respond to questions from our users, Website visitors and customers; (iv) improve our Website or services; (v) learn about users' and customers' needs; (vi) contact users for research, informational, and marketing purposes, including customizing our Website and social media pages for you based upon your information and browsing habits; (vii) track traffic patterns and Website usage; (viii) provide customer service and technical support; (ix) correlate information with other commercially available information to identify demographics and preferences to assist us and our customers in our research and marketing efforts; (x) provide specific relevant marketing, promotional, or other information to you; (xi) address information security and/or privacy practices, network functioning, engineering, and troubleshooting issues; (xii) investigate claims and/or legal actions, violations of law or agreements, and compliance with relevant applicable laws and legal process; (xiii) comply with law, or based on our good faith belief that it is necessary to conform or comply with the law, or otherwise to disclose information to prevent fraud to reduce credit risks, to cooperate with police and other governmental authorities, or to protect the rights, property or safety of visitors to the Website or users of the Digital Services, our partners or customers, or the public; and (xiv) process or engage in a sale of all or part of our business, or if we go through a reorganization or merger.

We may also share personally identifiable information and non-personally identifiable information externally with our Intell Partners, Company Partners/Sponsors, affiliates and/or business partners, as well as with other third-party service providers who help us provide operational services for the site and our business, which might include, but is not necessarily limited to: business entities that provide e-mail address management and communication contact services, retargeting services, network equipment and application management providers and hosting entities, credit and debit card payment gateways and processors and the issuing and acquiring banks involved in the funds settlement procedures necessary to charge your cards or financial accounts, entities which obtain information such as demographic information which might be aggregated with information we have about you, entities that allow us to personally identify visitors to the Website and/or users of the Digital Services, judicial, administrative and/or legal or financial accounting providers in the event that information must be reviewed or released in response to civil and/or criminal investigations, claims, lawsuits, or if we are subject to judicial or administrative process (such as a subpoena) to release your information or to prosecute or defend legal actions, and other service providers which may be involved in the other types of services and activities otherwise discussed in this Privacy Policy.

Business Transfers

If the Company or substantially all of its assets were acquired, or in the unlikely event that the Company goes out of business or enters bankruptcy, user information would be one of the assets that is transferred or acquired by a third party. You acknowledge that such transfers may occur, and that any acquirer of the Company may continue to use your personal information as set forth in this Privacy Policy.

Your Choices about the Information We Collect

If you do not consent to the way in which we may use your personal information, please do not submit any personal information to us. Please note that if you do not provide us with certain personal information the Company may be unable to provide you with its services, or those services may not be as good as they otherwise could be.

You may opt out of our various communications as follows:

Mailing List: (1) e-mail us at privacy@cfointell.com with the words “E-MAIL REMOVAL” in the subject line, or (2) call us at 732-868-0000 and clearly set forth your request.

E-mail Communications: (1) click the unsubscribe link located in our emails, or (2) by calling us at 732-868-0000 and clearly setting forth your request.

Third-Party Sharing: (1) e-mail us at privacy@cfointell.com with the words “THIRD-PARTY E-MAIL REMOVAL” in the subject line, or (2) by calling us at 732-868-0000 and clearly setting forth your request.

Text/SMS Message Consent and Opt-Out: If you choose, you can provide your mobile phone number to receive text message alerts from the Company. By providing your mobile phone, you are consenting to receive automated marketing text messages from us, but you can always use the Website without providing this consent to such marketing. Message and data rates may apply and you should check the rates of your mobile carrier. You can opt out from further text marketing communications by texting STOP to the SMS number used by the Company to contact you.

We may share your mobile phone number with our service providers to help us with the above activities, but not for their own marketing. We do not guarantee availability or performance of this text/SMS service, including liability for transmission delays or message failures.

Please note that even once we comply with any of your requests as set forth above, de-identified and aggregate data including your personal information may still be shared, but it will not be identified or identifiable to you.

Privacy of Children Who Visit the Website

We recognize the importance of children's safety and privacy. The Website is not designed to attract children and is not intended for use by any children under the age of 18. We do not request, or knowingly collect, any personally identifiable information from children under the age of 18.

Your California Privacy Rights

We collect various types of personal information about you during the course of your relationship with us. Under California law, if you are a resident of California, you may make a written request to us to disclose the categories or personal information of yours which we have shared with third parties, for the third parties' direct marketing purposes during the prior year. In response to your written request, we are allowed to provide you with a notice describing the cost-free means to opt-out of our sharing your information with third parties with whom we do not share the same brand name, if the third party will use such information for its direct marketing purposes.

If you would like to exercise your rights under California law, please send your written request to the e-mail address or postal address below. Please include your postal address in your request. Within thirty (30) days of receiving your written request, we will provide you with a Third-Party Direct Marketing Opt-Out Form so you may request that your personal information not be disclosed to third parties for their direct marketing purposes.

E-mail Address:

privacy@cfointell.com

Postal Address:

CFO Intelligence LLC
PO Box 568
Califon, NJ 07830-0568

ATTENTION: Privacy Officer

Phone:732-868-0000

Visitors to the Website From Outside of the United States

Your connection may be through and to servers located in the United States. Please note that the data protection laws in the United States and other countries might not be the same as those in your country. The Company does not target or seek visitors from outside the United States. By using the Digital Services, accessing the Website and/or submitting information to us, you specifically consent to the transfer of your information to the United States to the facilities and servers we use, and to those with whom we may share your information.

Updating Personal Information

We prefer to keep your personal information accurate and up-to-date. If you would like to change your contact information, please update your account information by calling us at 732-868-0000 or email at privacy@cfointell.com.

Security

We believe in providing a safe and secure experience for all of our online visitors. To that end, we have implemented security measures to protect the information collected from you. We maintain reasonable physical and electronic safeguards designed to limit unauthorized access to your personally identifiable information, and to protect you against the criminal misuse of that information.

While we use the foregoing security measures to protect your information, please note that no data transmitted over the Internet or stored and utilized for business purposes can be guaranteed to be completely secure. No security measures are perfect or impenetrable. We cannot guarantee that only authorized persons will view your information. We cannot ensure that information you share on or through the Digital Services will not become publicly available. You can reduce these risks by using common sense security practices such as choosing a strong password, using different passwords for different services, and using up to date antivirus software.

Questions / Changes in Notice

If you have questions or concerns with respect to our Privacy Policy, you may contact us at privacy@cfointell.com. We may elect to change or amend our Privacy Policy; in such event, we will post the notice changes in our Privacy Policy on the Website.

Last Updated: 01/__/22