Context and Purpose
As a professional volunteer organization, the Canadian Institute of Actuaries (CIA) is committed to enhancing the interests of its diverse membership. The present Privacy Policy has been prepared to affirm our commitment to ensuring the privacy of our members and others, and to inform them of our practices concerning the collection, use, and disclosure of information provided to the CIA, the choices our members have regarding such use and disclosure, and how they may correct that information.

Scope
The present Privacy Policy covers the collection, use, and disclosure of information provided to the CIA, the choices our members have regarding such use and disclosure, and how they may correct that information.

The CIA reserves the right to change this Privacy Policy from time to time. If the CIA makes a material change, this Privacy Policy will be updated accordingly. It is recommended that all CIA members periodically review this Privacy Policy in order to ensure their awareness of any changes.

Policy Statements
1. Personal Information
   a. The CIA only collects personal information that is necessary for the efficient operation of the organization. This information is collected, with the member’s consent, by telephone, fax, e-mail, the CIA website (Members Site), registration forms, dues forms, meetings, or other professional development activities.

   b. The information the CIA may collect includes, but is not limited to: name, home and office addresses, telephone and fax numbers, e-mail addresses, date of birth, gender, languages spoken, actuarial designations, current and previous employment, practice areas, educational history (university level only), CIA identification number, financial information (including credit card details for annual dues and meetings payment), language preference, and professional development and volunteer activity history.

   c. The personal information collected from members is used by the CIA to confirm a member’s identity, to maintain membership files, to communicate with them, to fulfill the CIA’s legal and legitimate business requirements, to provide them with the products and services requested, to process financial transactions, and to record their attendance at CIA events or meetings.
d. The CIA endeavours to maintain the accuracy of any information in its possession by communicating directly with the member. The CIA also encourages members to update their personal information online in the appropriate section of the CIA website. A member can, at any time, verify the accuracy or completeness of their information on file.

e. The CIA will retain personal information for as long as reasonable to fulfil the purposes stated in this Privacy Policy, and as long as required or permitted by law.

f. The CIA has implemented physical, organizational, and technological security measures to protect personal information against unauthorized access, disclosure, inappropriate alteration, and misuse. All safety and security measures are appropriate to the sensitivity level of the information.

2. Access

a. All information collected is held in strict confidence, unless stipulated otherwise in this Privacy Policy. Access to personal information is restricted to those CIA employees whose duties require them to have access.

b. All members have access to the personal information that is available in the Members Site. Every member’s name, city of residence, actuarial designation (Fellow or Associate), and membership status (active or retired) will be made available to the public. Certain other information, related to contact information, will also be made available unless the member opts to have this withheld from the public.

c. The CIA may provide some personal information (e.g., name, address, phone, fax, e-mail, designations, employment practice area, enrolment year, CIA volunteer service) to other actuarial organizations, including the Society of Actuaries and the Casualty Actuarial Society, if the Institute’s privacy officer considers this to be of benefit to the members of the CIA. There are also circumstances where disclosure of personal information to certain individuals or entities may be required or permitted by law. In cases where the CIA considers it appropriate or necessary to disclose personal information, the CIA will restrict the information disclosed to what it deems absolutely necessary.

d. The CIA may also provide access to personal information related to professional development activities, pursuant to the CIA Qualification Standard – Requirements for Continuing Professional Development (CPD).

3. Consent

a. Consent may be express or implied depending on the circumstances. When providing personal information to the CIA, members are implicitly consenting to the collection, use, and disclosure of this information as outlined in this Privacy Policy or otherwise at the time of collection, use, or disclosure. If a member does not consent, they should not provide their personal information to the CIA.

b. If the CIA requests additional personal information or intends to use or disclose personal information differently than outlined in this Privacy Policy, the CIA will advise the member at or before the time of collection, use, or disclosure (as the case may be) as to how the CIA will handle that personal information. However, when required or permitted by law, the CIA may collect, use, or disclose personal
information without the member’s consent.

4. **Questions**

General questions or concerns about this Privacy Policy, or about the accuracy, use, disclosure, or retention of personal information, should be directed to the CIA’s privacy officer:

Privacy Officer, 1740-360 Albert, Ottawa, ON K1R 7X7
Tel: 613-236-8196; fax: 613-233-4552; or e-mail: privacy@cia-ica.ca

**Exemptions**

The CIA website provides links to other websites. The CIA Privacy Policy does not extend to these websites. Once linked to another site, members are subject to the privacy policy of the new site.

**Escalation Procedures/Management of Non-compliance with this Policy**

In most cases, the privacy officer will address a member’s questions or concerns within 48 hours. Understandably, issues that involve more than a simple correction or updating of information should be submitted in writing. If a member is not satisfied with the handling of their question or concern by the privacy officer, they may contact the Executive Director of the CIA. If they are still not satisfied, they may wish to discuss the issue with the President of the CIA. If they are still not satisfied, the issue should be brought to the attention of the Privacy Commissioner of Canada.

**Definitions and Abbreviations**

N/A

**Associated Documents**

N/A

**References**

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