



Last Updated: May 1, 2018

Canalyst Financial Modeling Corporation Privacy Notice

Canalyst Financial Modeling Corporation (“Canalyst”) takes privacy and data security seriously. We are committed to transparency in the collection and use of your information. The Privacy Notice below describes how we use the information collected, and the circumstances under which we may share this information.

Collection and Use of Information

Information You Provide to Us

- **Client Onboarding and Registration:**

We provide equity research services for buy-side and sell-side actors through our online platform and database (the “Database”). To enable client access to the Database, we may collect and store certain business contact information including your name, company name, title/position at company, business email address and password, and internet protocol (IP) addresses that you access the database from. We use this information to confirm your identity and to enable access to the Database.

In addition, we also store the following information to administer your account and for billing – name, company name, title/position at company, LinkedIn website, business email address, business phone number and address, as well as all email correspondence between you and Canalyst.

- **Marketing Communications:**

You may select if you wish to receive email marketing communications with updates and other information regarding Canalyst by providing us with your name and email.

Canalyst has taken several steps to ensure we comply with Canadian Anti-Spam Legislation (CASL). When using any form of commercial electronic messages (CEM) for electronic marketing purposes, Canalyst will act in accordance with the Law by:

- Obtaining express consent from the client or recipient



- Presenting an opt-in option by asking recipients for confirmation before they are subscribed to our email lists
- Including a clear and detailed opt-out mechanism by allowing recipients to unsubscribe from our email lists at any time

For more information you may contact our Privacy Officer at **privacy [at] canalyst [dot] com**.

- **Careers:**

In connection with a job application or related inquiry, you may provide us with certain information about yourself (such as that contained in a resume, cover letter, or similar employment-related materials). We use this information for the purpose of processing and responding to your application for current and future career opportunities.


- **Contact Us:**

When you contact us with a request to book a demo, or a comment or question, we collect the information you provide such as your name and email address, along with additional information that we may need to help us promptly respond to your inquiry. We retain this information to assist you in the future and to improve our customer service and service offerings. We also use that information to establish and manage our relationship with you and provide quality service.

Information We Collect Automatically

We and our third party service providers, including Google Analytics, collect, process, store, and analyze information obtained from your browser, including IP address, device identifiers, browser characteristics, operating system details, language preferences, referring URLs, length of visits, and pages viewed. We also use “cookies” or other tools that track, measure and analyze the behaviors and usage patterns of visitors to the Canalyst website. We use this information to help us understand how visitors engage with the Canalyst website and to improve our visitors’ experience.

A cookie is a tiny element of data that the Canalyst website can send to your browser, which may then be stored on your computer or mobile device so we can recognize you when you return. We use cookies for analytics purposes as well as for certain features of the Canalyst website. You may set your web browser to notify you when you receive a cookie or to not accept certain cookies. However, if you decide not to accept cookies from the Canalyst



website, you may not be able to take advantage of all of the features of our website.

Your web browser may have settings that allow you to transmit a “Do Not Track” signal when you visit various websites or use online services. Like many websites, the Canallst website is not designed to respond to “Do Not Track” signals received from browsers.

Sharing of Information

Except as set forth in this Privacy Notice and as required or permitted by law, we do not sell or share your information with third parties without your consent.

Service Providers

Your information may be transferred (or otherwise made available) to our affiliates and other third parties who provide services on our behalf. Our service providers are given the information they need to perform their designated functions and are not authorized to use or disclose your information for their own marketing or other purposes.

Your information may be maintained and processed by us, our affiliates and other third-party service providers in the US or other jurisdictions. In the event that your information is transferred to the US or other foreign jurisdictions, it will be subject to the laws of that jurisdiction and may be disclosed to or accessed by the courts, law enforcement and governmental authorities in accordance with those laws.


We may employ other companies and individuals to perform functions on our behalf. Our employees, agents, and contractors who have access to personally identifiable information are required to protect the information in a manner that is consistent with this Privacy Notice.

Testimonials

We display personal testimonials of satisfied customers on our website in addition to other endorsements. With your consent we may post your testimonial along with your name.

Legal and Compliance

We and our service providers may provide your information in response to a search warrant or other legally valid inquiry or order, or to another organization for the purposes of investigating a breach of an agreement or contravention of



law or detecting, suppressing or preventing fraud, or as otherwise required or permitted by applicable Canadian, US or other law or legal process. Your information may also be disclosed where necessary for the establishment, exercise or defence of legal claims and to investigate or prevent actual or suspect loss or harm to persons or property.

Sale of Business

Your information may be provided to third parties in connection with a merger or sale (including transfers made as part of insolvency or bankruptcy proceedings) involving all or part of CanaIyst or as part of a corporate reorganization or stock sale or other change in corporate control, including for the purpose of determining whether to proceed or continue with such transaction or business relationship.

Safeguarding and Retention of Information

We have implemented reasonable administrative, technical, and physical measures in an effort to safeguard the information in our custody and control against theft, loss and unauthorized access, use, modification, and disclosure. We restrict access to your information on a need-to-know basis to employees and authorized service providers who require access to fulfill their job requirements.

Additional Information

Third Party Websites

The site may contain links to other websites that are not owned or controlled by us. We have no control over, do not review and are not responsible for the privacy policies of or content displayed on such other websites. When you click on such a link, you will leave our service and go to another site. During this process, another entity may collect information from you.

Updates to the Privacy Notice

We may change this Privacy Notice from time to time. If we make any changes, we will notify you by revising the “Last Updated” date at the top of this Privacy Notice and, in some cases, we may provide you with additional notice (such as adding a statement to our homepage or sending you an email notification). We encourage you to periodically review this page for the latest information on our privacy practices.



Contact Us

Canalyst welcomes your comments and questions regarding this Privacy Notice and the use of your information. If you have questions or concerns, please contact our Privacy Officer at **privacy [at] canalyst [dot] com**.