

## **Data Privacy Policy**

Last revised: 4/22/2024

Feather & Co. (“us”, “we”) has the utmost respect for your privacy and does not retain, sell or otherwise use your information in any other connection than to provide you with the services that you have requested.

This Data Privacy Policy covers our site, [www.featherandco.com](http://www.featherandco.com) (“site”), and the services we may provide you in line with our Terms and Conditions.

### **What data do we collect and why**

The data we collect from you is categorized into personal data and non-personal data. Across both categories, we collect only the minimum amount required to provide you with the services you have requested.

The personal data that we collect is limited to your name, contact details and services that you have requested. We collect these details in order to serve you in the ways you have contracted us for. During our service provision, we may also generate information and email records concerning your personal matters and those of the estate as may be required to provide you with the services you have contracted us for. We do not collect personal health information in any form.

In addition to personally identifiable information, our site automatically collects non-personal information such as technical information of your device, identifiers such as IP addresses, time spent on our site, clicks and other behavioral data points.

The data we collect are kept in our cryptographically secured case management system.

The data retention period is twelve (12) months after the conclusion of our engagement with you. After this, all data will be deleted.

### **How we collect data**

Personal information is collected directly from you.

Non-personal data is collected automatically via cookies, which we will seek your consent for. We may use third-party systems, such as Google Analytics, to assist us in the collection and processing of non-personal information regarding the use of our site.

**Your informed consent will be explicitly sought for processing of the above data**

When you contract us to provide services for you, we sign a contract that confirms your informed consent to the collection and processing of the data listed above.

You may withdraw this consent at any time in part or in whole, e.g. by reaching out to ["hello@featherandco.com"](mailto:hello@featherandco.com).

### **Use of our site requires acceptance of our Terms and Conditions and this policy**

We cannot provide you with services if we are unable to collect and process your name, contact information and service requests.

If you do not consent to their collection and processing, you may not proceed with using our site beyond acquainting yourself with the free content and guides.

### **We will share only necessary personal details with third-party service providers that you have selected with us**

In case you have contracted us to coordinate third-party service providers, it will be necessary for us to share and use your personal information to coordinate the provision of services.

Your data is not used, distributed or sold in any other manner with third parties.

### **We comply with HIPAA, GDPR, CCPA and all other major data privacy laws, which gives you certain rights**

We adhere to all of the requirements concerning data processes as set out in GDPR, CCPA and other major data privacy laws currently in place.

Accordingly, you have the right to remove, revise and review your data at any time. You may also remove, revise and review your consents and you can seek information on the third-parties we have shared your data with during our service provision. You also have the right to access any and all data we have stored concerning you at any time and you may port your data to other service providers should you so choose.

You can reach out to ["hello@featherandco.com"](mailto:hello@featherandco.com) to seek further or to ask us to take action in support of your rights. We endeavor to fulfill all data related requests within 30 business days at the latest.

### **We secure our data with best-in-class methods, but each transmission you make carries a risk you are responsible for**

Our security methods are best-in-class and they are deployed in response to our rigorous risk analyses that ensure that your personal information is safe and secure.

We implement HIPAA compliant security procedures. Your data is secured cryptographically and, whenever possible, it is anonymized and contained in separate registers without personal identifiers. We have strict access controls in place and our staff has access to only cases they manage, while they are managing them.

While we maintain best-in-class security methods, it is important that you acknowledge that there are inherent risks in transmitting personal information even in the most secure environment.

Every time you transmit personal data, you acknowledge that there is a risk of loss, unauthorized access, loss or other damage. We are not responsible for damage or loss of any information transmitted to us.

We comply with breach notification procedures as required by GDPR, HIPAA, CCPA and other major data privacy laws. We conduct regular security audits, and our staff is trained to respond to breaches.

You may seek further information on our data privacy processes at any time by reaching out to "[hello@featherandco.com](mailto:hello@featherandco.com)".

### **Some of our services involve marketing by us or third parties**

Depending on which services you have contracted us for, we may utilize direct marketing or depend on direct marketing by third parties. Your informed consent will be sought in advance, and you have the right to revise or remove your consent at any time.

### **Changes to this policy may be made as necessary**

We closely monitor the regulatory data privacy landscape, and we expect changes to be necessary to this policy from time to time. We will notify you once changes have been made. For customers who have agreed to a previous version of this policy, changes will take effect have seven (7) days from notification.