



## **PRIVACY POLICY**

The Vermont Community Foundation (“the Foundation”) provides individuals with charitable gift annuity administration services, charitable trust administration services, and services designed to assist individuals in their philanthropy. In the process of providing these services, the Foundation collects nonpublic personal information about individual donors and beneficiaries. We have always protected our donors’ right to privacy in the most stringent manner, and we will continue to abide by our strict code of ethics surrounding donor confidentiality.

### ***What nonpublic personal information do we collect?***

- Information necessary to set up and maintain your account in connection with providing gift annuity and trust administration services, such as your name, address, social security number, date of birth, account holdings, and electronic banking information.
- Information about your financial holdings and objectives that is necessary to help you structure your philanthropy in the most appropriate manner.

### ***How do we protect that information?***

We disclose your nonpublic personal information only as provided herein. In all instances, we restrict access to your nonpublic personal information to those employees and service providers who need to know that information in order for us to carry out our services. We maintain physical, electronic, and procedural safeguards that comply with federal standards to guard your nonpublic personal information.

We may disclose your nonpublic personal information to outside companies that we use to carry out the services we provide for our donors. This could include companies that assist us in connection with the administration of your account, and planned giving administration services. All outside companies are contractually bound to use any nonpublic personal information only in connection with the services they provide to the Foundation.

### ***What information may we be required to disclose?***

We may be required to disclose nonpublic personal information pursuant to lawful requests, such as subpoenas or court orders or in compliance with applicable laws.

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We do not reveal information unless we have a good faith belief that an information request by law enforcement or private litigants meets applicable legal standards. We also may share nonpublic personal information when we believe it is necessary to comply with the law, to prevent fraud or other illegal activity perpetrated through the Foundation website or services, or to prevent imminent harm to any person or group of people. This may include sharing information with other companies, lawyers, agents, or government agencies.

Your use of our charitable gift annuity administration services, charitable trust administration services, philanthropy-related services, or website in connection with any of these services constitutes your agreement with this Privacy Policy. If you do not agree to this Privacy Policy, please do not use our services or website. The Foundation reserves the right to change its Privacy Policy at any time by posting changes on this page. Your continued use of our services and/or website following the posting of any changes will signify your acceptance of those changes.

Questions about the Foundation's Privacy Policy should be directed to Debbie Rooney, VP for Finance and CFO. She can be reached at (802) 388-3355, ext. 229, or [drooney@vermontcf.org](mailto:drooney@vermontcf.org).

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