

Bishop & McKenzie LLP Client Privacy Policy

In addition to the legal principle of solicitor-client privilege and a lawyer's ethical obligations with respect to confidential information contained in the Law Society of Alberta Code of Professional Conduct, Bishop & McKenzie LLP is required to deal with personal information in compliance with Alberta's *Personal Information Protection Act* (PIPA) and, when necessary, in compliance with the federal privacy law, the *Personal Information Protection and Electronic Documents Act* (PIPEDA).

The staff and lawyers at Bishop & McKenzie LLP recognize the importance of privacy and the sensitivity of personal information that we may have concerning clients and other individuals associated with our firm. As practicing lawyers we have a professional and ethical obligation to keep confidential all information we receive within the lawyer-client relationship except as required to carry out your instructions and fulfil our legal obligations. We are committed to safeguarding the personal information we have concerning any individual.

What is personal information?

Personal information is information about an identifiable individual, and includes name, home address, home phone number, personal e-mail address, ID numbers, personal financial information, credit card numbers, educational qualifications, medical information and social insurance numbers. In Alberta, business contact information (such as office address, job title, business phone number, business email address or business fax number) is not considered personal information.

Why do we collect, use and disclose personal information?

We collect, use, and disclose personal information in order to meet our clients' legal needs. For example, we may need to collect, use, or disclose personal information:

- to establish, manage, and terminate our relationship with you;
- to fully understand your legal issues;
- to assist you with immediate and ongoing legal needs;
- to ensure accuracy of information;
- to comply with the law; and
- to comply with ethical and legal obligations of service to you.

The specific purposes for collection, use and disclosure of personal information depends on the nature of your legal needs and may change in the course of our relationship.

How do we collect, use and disclose personal information?

We collect, use and disclose personal information by lawful, fair and reasonable means, and only for lawful, fair and reasonable purposes. When possible and practical, we collect personal information directly from the individual to whom the information relates.

We may ask you for consent to collect, use and disclose your personal information at the start of a retainer or during the course of our representation. We may collect, use or disclose your personal information without your knowledge or consent where required or permitted by law, regulation, or the Rules of the Law Society of Alberta. Generally, by providing your personal information to Bishop & McKenzie LLP and continuing to deal with us, your consent to the collection, use and disclosure of information in accordance with this Policy is implied.

When third parties are involved in the collection, use or disclosure of our clients' personal information about you (such as medical professionals, financial institutions, contract service providers) we will request your consent, unless there is a

reasonable explanation to consider that your consent to collect, use or disclose that information is implied. **Under no circumstances do we disclose or sell your personal information or business contact information to third parties to enable them to market their products and services.**

At any time you may refuse to allow Bishop & McKenzie LLP to collect, use or disclose your personal information, but if you make that choice, you must advise our office promptly, and, as a result, we may not be able to meet your legal needs. If at any time you have questions or concerns about your personal information or this Policy, we encourage you to ask a lawyer or contact our Privacy Officer.

How do we manage your personal information?

The staff and lawyers at Bishop & McKenzie LLP are aware of this policy and the importance of keeping your personal information accurate and secure.

Accuracy: Bishop & McKenzie LLP endeavours to keep your personal information accurate and current so we can assist you in your legal matters. If during the course of our professional relationship, any of your information changes, please inform us so that we can make the necessary changes.

Security: Bishop & McKenzie LLP endeavours to keep your personal information technologically and physically secure from loss, theft or unauthorized access, disclosure, copying, use or modification.

Retention: Bishop & McKenzie LLP endeavours to retain personal information only as long as required to meet the purposes for which it was collected or as required by law.

Can you access your personal information?

You may request correction of or access to the personal information we have about you. The request must be in writing and directed to our Privacy Officer. We may charge a reasonable fee for retrieval and copying of your personal information.

Access to your personal information will be denied if access would disclose personal information about a third party, or where denial is permitted or required by law. Access to your personal information may be denied if it relates to existing or anticipated legal proceedings against you, including unpaid bills to the law firm.

How do we respond to your specific privacy concerns?

If you have questions or concerns regarding your personal information or about this Policy, please contact our Privacy Officer:

Tara L. Hamelin

Bishop & McKenzie LLP
Suite 2500, 10104 - 103 Avenue
Edmonton, Alberta T5J 1V3

Phone: 780.426.5550

Fax: 780.426.1305

This Policy may be revised from time to time as required or permitted by law.