

Privacy Policy of IIA Switzerland

Privacy is important for us! We therefore endeavour to collect and process your personal data only insofar as necessary in order to perform our tasks in accordance with the Statutes. We regularly raise our employees' awareness concerning privacy issues and it is an important concern for us that your personal data are safe with us.

If you have any questions about how your personal data are handled by us, please contact us at the following address:

The Institute of Internal Auditors Switzerland (IIA Switzerland)
Vulkanstrasse 120
CH-8048 Zurich
+41 (0)44 298 34 34
info@iias.ch

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You can find details below about how we process your personal data:

1. Collection and processing of personal data

We collect and process data relating to the people who use our services (e.g. members, participants in seminars and events, people who create a free profile or people who obtain study material through our website) as well as the people who provide services on our behalf (e.g. teachers at our seminars and events or external event organisers).

We endeavour to limit the collection of personal data to the extent necessary in order to perform our tasks.

You can find an overview below of the specific personal data that are collected by us:

1.1 In relation to individual or associate membership:

Mandatory information:

- type of membership
- form of address, first name and surname
- date of birth
- language
- personal information:
 - address, town/city, country
 - email address
 - mobile telephone number
- highest level of training completed / diploma *
- professional information *
 - company name and sector
 - address, town/city, country
 - department and function within the company

(* necessary in order to determine the type of membership)

Optional information:

- title
- telephone number
- additional email address
- interest in ERFA Groups

1.2 In relation to corporate membership:

Mandatory information:

- type of membership
- form of address, first name and surname
- language
- contact details: company name and sector, address, town/city, country, email address

Optional information:

- additional email address
- all personal information such as e.g. title, date of birth, telephone numbers, education etc.



1.3 In the event of registration for a seminar or event, the creation of a free profile or the ordering of study material (if not a member):

Mandatory information:

- form of address, surname and first name
- date of birth (necessary for identification, where two people have the same first names and surnames)
- language
- personal information:
 - address, town/city, country
 - email address
 - mobile telephone number

Optional information:

- title
- telephone number
- professional information:
 - company name/name
 - address, town/city, country

1.4 In relation to a teacher (if not a member):

Mandatory information:

- form of address, surname and first name
- language
- personal or professional information**:
 - company name, address, town/city, country
 - email address
 - mobile telephone number
- qualifications and educational background
- social insurance number **

(** individual, depending upon the teacher)

Optional information:

- date of birth

The following data are also collected:

- for members: IIA USA membership number
- for seminars and events: information concerning courses and events attended
- correspondence and payment information
- technical data and meta data relating to usage of our website and communication with us

2. Purposes of data processing and legal bases

We process the personal data collected exclusively for the following purposes:

- registration of membership with IIA Switzerland



- registration of membership with IIA USA (surname, first name and email address are passed on in order to register the membership with IIA USA and to enable members to access the services of IIA USA)
- holding of seminars and events
- completing orders for study material (surname, first name and email address are passed on to IIA USA in order to enable access rights to online study material to be granted)
- processing of payments
- compliance with legal obligations
- conducting surveys and assessments for the purpose of improving our services
- assessing website usage, such as e.g. number of visits, time of visit, volume of data transmitted, source/referring page from which you were directed to the site (browser used, operating system used, IP address used - where applicable anonymously)

3. Bases for data processing

If you have consented to the processing of your personal data by us, this constitutes the basis for lawful data processing by us. **You can withdraw your consent at any time in writing (including electronically). Our contact details can be found at the start of this Privacy Policy.**

If you withdraw your consent, we shall not process your personal data any further, unless processing is necessary for the exercise of legal claims by us – e.g. in relation to seminars and events. Any withdrawal of consent will not affect the lawfulness of any processing of your personal data based on consent occurring before it was withdrawn.

In some isolated cases, it is conceivable that a legal rule may also provide a basis for data processing by us.

4. Sharing of data with third parties and transmission of data abroad

We only share data with third parties if this is necessary for the performance of our tasks – e.g. for the purpose of order processing, the holding of seminars and events or compliance with legal obligations (contracts, membership). **This also involves the transmission of personal data abroad on a limited scale.**

Recipients of your personal data may include:

- IT providers for membership and course management systems, accounting and payment systems including data backups such as HubSpot as a marketing tool
- IIA USA (see section 2 above for details)
- teachers at our seminars and events, ERFA managers or employees of companies that are responsible for holding our seminars and events
- payment service providers and banks for the purpose of processing payments
- authorities, where we are obliged to do so by law

We do not sell data to third parties and do not use your personal data for marketing purposes without your consent.

5. Cookies / tracking and other technologies relating to usage of our website

We use cookies on our website. Cookies are packages of data (text files) that are exchanged between different computers. Websites can use cookies to store user data locally and on servers. Cookies make it possible to identify who has visited this website via a randomly generated unique

identifier. This technology can be used for instance to manage login data, browsing history or settings and operations within web applications (e.g. basket) in a more user-friendly manner and to display user-specific content on the website. A distinction is drawn between necessary cookies and performance cookies:

- Necessary cookies are required for the proper operation of the website. They ensure that it is possible to navigate between different pages without losing any information that has been entered into a form or inadvertently logging out. In addition, necessary cookies are used to maintain the settings applied for the website (e.g. language chosen or consent granted) after the visit to the website has ended. If you block necessary cookies, it is possible that the website may not function properly.
- Performance cookies are used to optimise content. They enable website usage to be recorded and assessed – depending upon the circumstances, also after the end of any individual usage. This assessment is conducted using the analytical services of third-party providers (see the details provided below concerning HubSpot).

The cookies referred to above are used on our website and in our blog via the marketing automation software HubSpot provided by the US firm Hubspot Inc., 2nd Floor 30 North Wall Quay, Dublin 1 (hereinafter “Hubspot”); the location of the servers and thus of data storage is in Ireland (EU). Hubspot is an integrated software solution that we use to cover various aspects of our digital marketing, sales and customer relation management. We also use the tool for analytical purposes in relation to our online content in order to optimise it and to provide you with the best possible, user-friendly service. Further information can be found in the Terms of Service and the Privacy Policy of HubSpot Inc. at <http://www.hubspot.com/terms-of-service> and <http://www.hubspot.com/privacy-policy>.

You can object to the usage of cookies when accessing our website and can also delete any cookies that have previously been stored in your browser. The procedure for deleting cookies differs from browser to browser, and cannot therefore be described in general terms. If you object to the usage of necessary cookies, it is possible that this may impair usage of the website.

6. Presence in social networks

We have an intermittent presence on some social networks (currently LinkedIn). If you follow us on any social network, the provider of the respective social network is responsible for the lawful processing of your personal data. We do not have any influence over how and for what purposes your personal data are processed by the providers of social networks.

7. Duration of storage of personal data

We retain your personal data for as long as is necessary for the performance of our tasks, or for as long as is required by law. Unless this is not possible on account of any legal or contractual obligation, data are inactivated and archived.

8. Data security

We endeavour to take appropriate security measures in order to protect your personal data. These measures ensure that the confidentiality, integrity and availability of your personal data is always guaranteed, and that they are protected appropriately against unauthorised access or loss.

Our data are held on servers situated in Switzerland. Data backups are stored on servers situated in Switzerland or Germany.

9. Your rights

Data protection law provides for various rights, which you may exercise in respect of your own individual personal data. These rights include:

- the right to obtain information as to whether we are processing any data relating to you, and if so which data
- the right to obtain the rectification of any inaccurate personal data
- the right to obtain the erasure of your personal data (unless this right is precluded by any legal obligation to retain data)
- the right to receive particular personal data relating to you in a commonly used electronic format or to obtain the transmission of your personal data to another processor
- the right to withdraw your consent to the processing of your personal data, where processing is based on your consent
- the right to obtain further information, where this information is necessary for the exercise of your rights

Please write to the **address indicated at the start** (also electronically) if you would like to exercise any of your rights. You can also exercise the above-mentioned rights against third parties acting on our behalf. In such cases also, please contact the address indicated at the start.

10. Amendment of this Privacy Policy

As the factual circumstances and legal requirements are liable to change, we reserve the right to amend this Privacy Policy at any time in line with the prevailing circumstances.

Last updated: 24 October 2023