

# Privacy Policy

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This privacy policy applies to Dr. W. Meili + Partner AG (plc), Zurich, Pannell Kerr Forster AG, Zurich (including the Zug branch), PKF Consulting AG, Zurich, and PKF Wirtschaftsprüfung AG, Zurich (collectively referred to as PKF Zurich).

This is not an exhaustive description; where applicable, other privacy policies or general terms and conditions govern specific matters. These data protection guidelines apply, in particular also to our website ([www.pkf.ch/en](http://www.pkf.ch/en)), which contains a direct link to this data protection guideline and is subject to PKF Zurich's control.

Protecting your privacy is very important to us. We respect your privacy and private sphere and ensure their protection, as well as the lawful processing of your personal data. If you provide us with personal data from other persons (e.g. family members, data from co-workers), please ensure that these persons are aware of this privacy policy and inform us of their personal data only if you are allowed to do so and if that personal data is correct.

Personal data is considered to be all details and information relating to an identified or identifiable person. In addition to your contact details such as name, telephone number, postal address or email address, this includes other information that you provide us, such as date of birth or religious affiliation.

When we speak of processing your personal data in this privacy policy, we mean any handling of your personal data. This includes storage, transfer, processing, use, erasure, etc.

In this privacy policy, we inform you about which data collected from you is processed by us, why we need this data and how you can object to data collection.

This privacy policy is based on the EU General Data Protection Regulation (GDPR). Although the GDPR is a European Union (EU) regulation, it matters to us. The Swiss Federal Act on Data Protection (FADP) is heavily influenced by EU law, and companies outside of the European Union or the European Economic Area (EEA) must comply with the GDPR in certain circumstances. Therefore, we have amended this privacy policy accordingly.

## I. Who is responsible for data processing?

Dr. W. Meili + Partner AG, Zurich, Pannell Kerr Forster AG, Zurich (including the Zug branch), PKF Consulting AG, Zurich, and PKF Wirtschaftsprüfung AG, Zurich (collectively referred to as PKF Zurich) are responsible for processing your data.

If you have any questions or suggestions regarding data protection, you can mail our operations Data Protection Officer, Ms Dominique Kipfer to the following address at any time:

PKF Consulting AG  
Data Protection Officer  
Lavaterstrasse 40  
CH-8002 Zurich, Switzerland

or send an email to: [dominique.kipfer@pkf.ch](mailto:dominique.kipfer@pkf.ch)

## **II. Why do we collect personal data?**

We know how important the careful handling of your data is to you. All data processing takes place only for specific purposes. These may arise, for example, out of technical necessity, contractual requirements, legal regulations, predominant interests, i.e. for legitimate reasons, or upon your express consent. We collect, store and process personal data as necessary. For example, for management of customer relations, the provision of our services, the handling of orders and contracts, sales and invoicing, to respond to questions and concerns, for information about our services and marketing purposes, for providing support in technical matters, as well as for evaluation and the continued development of services.

## **III. What data is collected?**

Primarily, we process personal data that we obtain from our Clients and through other contractual relationships with business partners of theirs, as well as through other persons involved, or which we collect from users of our websites and other applications.

Insofar as permitted, we also derive certain data from publicly available sources (e.g. debt collection registers, land registers, commercial registers, the press, the Internet) or receive it from our Clients and their employees, from authorities (arbitration), courts and other third parties (e.g. counterparties, business partners and contracting partners of our Clients). In addition to the data you provide us directly, the categories of personal data that we receive from third parties about you include, in particular, information from public registers, information which we learn about in connection with official and judicial procedures, information in connection with your professional roles and activities, information about you in correspondence and discussions with third parties, credit rating information (if we do business with you personally), information about you provided to us by persons close to you (family, advisers, legal representatives etc.), so that we may conclude or process contracts with you or with your involvement (e.g. references, your postal address for deliveries, proxies), information for compliance with legal requirements, such as combating money laundering and export restrictions, information from banks, insurance companies, sales partners and other contracting partners of ours for the use or provision of services by you (e.g. payments and purchases made), information from media and the Internet about you (insofar as this has been advertised in the specific, e.g. as part of an application, press review, or marketing/sales etc.), your addresses and, if applicable, interests and other sociodemographic data (for marketing), data in connection with the use of the website (e.g. IP address, information about your device and settings, date and time of the visit, pages and content visits, the functions used, the referring website, exact location).

Sensitive personal data will only be processed with the consent of the data subject, unless the data has been transferred to us indirectly and for legitimate purposes. Examples of sensitive personal data we receive includes documents that may also provide information about race or ethnic origin, religious

beliefs, health status, political views and biometric data of private individuals or beneficial owners of legal entities. The sensitive data also includes negative information related to criminal offences or criminal convictions of potential or existing customers and applicants.

Although our website and services are not consciously tailored or targeted at children, we occasionally receive information about children, for example, as part of a service contract.

#### **IV. On what legal basis do we process personal data?**

The collection and use of personal data as part of our business activities and provision of our products and services can be legally justified as follows:

- Contract: personal data may be processed by us only to the extent necessary for fulfilling our contractual obligations.
- Consent: personal data may be processed by us if you voluntarily agreed to this when providing us your personal data.
- Legitimate interests: personal data may be processed by us if this serves our legitimate interest and we found in advance the processing to be appropriate, reasonable and balanced. These interests include:
  - Provision of services and products required by our Clients;
  - Marketing - to provide up-to-the-minute market insights and expertise, as well as to submit offers and invitations that we consider to be of interest to our Clients, prospective partners, readers and others;
  - Recruitment - to seek qualified applicants.
- Legal obligations and public interest: personal data may be processed by us if this serves the fulfilment of legal duties or obligations, or mandates of public interest.

#### **V. Cookies / tracking tools (e.g. Google Analytics / Double Click / web analytics service etc.)**

On our website, we do not generally rely on “cookies” and similar technologies with which your browser or device can be identified. A cookie is a small file that is sent to your computer automatically or saved to your computer or mobile device by the web browser you use when you visit our website. In this way, if you visit this website again, we can recognise you, even if we do not know who you are. In addition to cookies which are only used during a session and are deleted after your visit to the website (“session cookies”), cookies can also be used to store user settings and other information for a certain period of time (e.g. two years) (“permanent cookies”). However, you can set your browser to reject cookies, save them for one session only, or otherwise delete them prematurely. Most browsers are set by default to accept cookies automatically. We do not use permanent cookies to better understand how you use our offerings and content. In general, cookies can also be blocked by you - although this can cause functions such as language selection, location etc. to stop working.

We may use technology from multiple vendors to conduct website analytics, or to track users, including Google Analytics technologies. Google Analytics is Google Inc., a company of the holding company Alphabet Inc., based in the United States. The anonymised IP address transmitted by your browser as part of Google Analytics is not merged with any other data held by Google. Only in exceptional cases will the entire IP address be transmitted to a Google server in the USA and truncated there. According to Google Inc., under no circumstances will the IP address be linked to other data relating to the user.

For more information about the web analytics service, please visit the Google Analytics website. For instructions on how to prevent your data from being processed by the web analytics service, please visit: <http://tools.google.com/dlpage/gaoptout?hl=de> (link opens in a new window).

#### **VI. Contact form**

You have the opportunity to get in touch with us via our contact form. The entry of certain personal data is mandatory (marked in the respective form):

We use this and any other data entered voluntarily (such as title, address, telephone number, company, etc.) only so as to be able to respond to your contact query in the best possible and personalised way. Any information provided by you voluntarily on how you found out about our offer, will furthermore be used for internal statistical purposes.

All emails that come to us via the contact forms are stored with us.

#### **VII. How long will your data be kept?**

We retain personal data in order to provide our services, make offers, stay in touch with you, to comply with applicable laws and regulations as well as our professional obligations. We retain personal data for as long as it is needed to fulfil the purpose for which it was collected, or for a period of time required by applicable laws and regulations or contractual agreements. Personal data no longer needed by us will be deleted by us.

#### **VIII. What are your rights in respect to your personal data?**

With regard to your personal data, you have the following rights:

- you can request information about your personal data stored.
- you can request correction, amendment, blocking or deletion of your personal data
- you can object to the use of your personal data for marketing purposes.

Please note, however, that we reserve the right to enforce the limitations imposed by law, such as when we are obliged to retain or process certain data, or have an overriding interest in doing so (as far as we may invoke this) or we require the data to assert claims.

To exercise this right, simply write to:

PKF Consulting AG  
Data Protection Supervisor  
Lavater strasse 40  
CH-8002 Zurich

or via email to: [dominique.kipfer@pkf.ch](mailto:dominique.kipfer@pkf.ch).

#### **IX. Will your data be disclosed to third parties?**

In some cases, we may share personal data with trusted third parties for the provision of efficient and high-quality services and products. The data recipients are contractually obliged to protect the data entrusted to them. This may affect some or all of the following recipient categories:

- member companies of the PKF network, for any administrative purposes (e.g. hosting and support of IT applications, conducting of customer conflict investigations), as well as providing professional services to our customers (e.g. consulting services by PKF member companies in different regions);
- third parties who assist us in the provision of services and products (e.g. telecommunications system providers, post office management, IT system support, document creation services, cloud-based software services);
- our professional advisers, including lawyers, accountants and insurers;
- providers of payment services;
- providers of marketing services;
- law enforcement agencies or other governmental and regulatory authorities (e.g. Federal Audit oversight Authority of Switzerland (RAB), Swiss Financial Market Supervisory Authority (FINMA)) as well as other third parties if this serves to comply with applicable laws and regulations, and
- providers of personnel services.

#### **X. Will your personal data be transmitted abroad?**

We are also entitled to transfer your personal data to third parties (for example, external service providers) abroad. They are obliged, to the extent that we ourselves are, to comply with data protection. If the level of data protection in a country does not correspond to that of Switzerland, we contractually ensure that protection of your personal data corresponds at all times to that of Switzerland.

#### **XI. Data security.**

We use appropriate technical and organisational security measures to protect your stored personal data against manipulation, partial or complete loss, as well as against unauthorised access by third persons. Our security measures are constantly being improved in line with technological advances.

We also take internal company data protection very seriously. Our employees and the external service providers commissioned by us, are committed to secrecy and observing the data protection provisions.

We take reasonable precautionary measures to protect your data. However, the transmission of information via the Internet and other electronic means / devices, always carries certain security risks and we cannot guarantee the security of information transmitted in this way.

#### **XII. Changes to this privacy policy.**

We reserve the right to amend and supplement this policy at any time. Please refer to this policy regularly. The current version updated on our website shall apply.

This privacy policy was last updated on 9 January 2023.