



Confidentiality Policy Changes

Contact the Foundation Executive Director directly regarding any matter, including the filing of a breach or suspected breach of confidentiality complaint, or with questions about this policy.



Jewish Community Foundation
of Central Pennsylvania
3301 North Front Street
Harrisburg, PA 17110
Phone: 717-236-9555
Fax: 717-2360956
www.pajewishendowment.org

The Foundation may make changes to this confidentiality policy in the future. If we do, we will provide to you a revised policy. All Board and non-board Committee members, vendors and employees involved with the Foundation sign and agree to comply with all current and future confidentiality policy provisions.

Further, they are advised that compliance with the terms and conditions of this confidentiality policy remain in force following their board and committee service, employment and/or vendor service, and even if they, for any reason, terminate their relationship with the Jewish Community Foundation of Central Pennsylvania - this policy remains in force.

Confidentiality Policy

**Jewish Community
Foundation
of Central Pennsylvania
(Herein after Foundation)**

DONOR/PROSPECT CONFIDENTIALITY POLICY

We are committed to keeping all personal information we have about clients and prospective clients confidential and secure. This policy describes how we protect their privacy.

Our Confidentiality Policy

Our business is to offer quality planned giving and endowment services to our clients and partners. We only use personal client information to administer our business. We do not sell or rent client lists or data about our clients to others. We require all Board members, employees, financial professionals and companies providing services for us to keep client and prospective client files confidential.

Keeping Files Secure

We have security programs that protect data about clients and prospects from unauthorized use or disclosure. Access to files is limited to those who need it to administer our business. Our confidentiality policy applies to both current, former, and prospective clients and prospects.

Information We Collect About Clients and Prospects

We collect personal information about clients and prospects to administer our business, confirm identities and meet legal requirements. The information we collect varies for different products and services and may include:

- Name, age, address, phone number and social security number
- Occupation and income

Information We Collect About Clients and Prospects (continued)

- Financial goals and preferences
- Assets and liabilities, insurance, savings and investments
- Information about the products and services clients and prospects utilize to make or discuss making charitable gifts through us

Clients provide most of this information themselves. We may also ask others about clients and prospects including:

Companies whose products and services clients purchase or consider purchasing through us

- State and federal agencies

We disclose information about clients to state, federal and other government agencies and others as required by law, including:

- Other non-profits relevant to our business and services

Who We Share Data With

With their express permission we may share relevant personal information about clients and prospects with their own

- Financial professionals
- Companies whose products and services clients and prospects purchase or may purchase through us

We do not share information about clients and or prospects without their express permission.

We may share restricted information to:

- Companies that perform support services for us, including those which:
 - Print and mail account statement
 - Support our computer system
 - Clear and settle trades
 - Help market our products and services to you

Companies that provide support services for us are required to keep client information confidential. They must also agree in writing to use personal information only to provide services for us.

The Foundation offers planned giving and endowment related financial products that may interest you. Some financial professionals offer products and services through us. We also offer products and services from other sources.

This privacy policy does not apply to data that your financial professional may collect for the implementation of other products and services, even those that may benefit the Foundation and our participating organizations.