

DONOR CONFIDENTIALITY NOTICE

I. POLICY

Access to Pioneer Institute's online and offline donor financial information is strictly limited to those staff members and associates who need to process the data. Pioneer's staff will occasionally share its donor list in confidential exchanges with an independent auditor to ensure compliance with state and federal reporting standards.

Pioneer Institute will not:

- Trade, share or sell a donor's personal information with any entity unless the donor has given the Institute specific permission to do so, or
- Send donor mailings on behalf of other organizations

II. PROCEDURE

The Institute collects and uses basic personal information from online and offline donors that includes: amount donated, mailing address(es), telephone number(s), email address(es) and donor comments. The Institute only uses online payment processing services with world-class security and strong reputations. Should an individual opt to provide Pioneer Institute with their credit or debit card information in person, it is destroyed once the online donation is successfully processed. Otherwise, the Institute does not store, nor does it have access to donor credit card information, bank account numbers or other account information sent from the donor to those processing services.

The Institute uses personal online and offline donor information for the following purposes:

- Donation receipts
- Donation thank you letters
- Annual financial statement audit for random sampling to confirm donations
- Notification of upcoming fundraising and/or social events
- Internal analysis and record keeping
- Reporting to U.S. and state agencies as required by law

III. OPT OUT

Online and offline donors who wish to remove their name and contact information from mailing lists should send a request for removal to: kmccarron@pioneerinstitute.org, calling 617-723-2277 ext. 202 or mailing:

Kathryn McCarron, Chief Development Officer
Pioneer Institute
185 Devonshire Street, Suite 1101
Boston, MA 02110

Pioneer Institute will promptly remove from marketing lists online and offline donor name and contact information upon receiving a request for removal.