

EY Privacy Notice – FRS Financial Planning Services

1. Introduction

This Privacy Notice is intended to describe the privacy practices EY follows in providing financial planning services via MyFRS (the “Services”).

2. Who manages the Services?

“EY” refers to one or more of the member firms of Ernst & Young Global Limited (“EYG”), each of which is a separate legal entity and can determine the purposes and means for data processing in its own right. The entity that is providing the Services and determining the purposes and means for data processing here is Ernst & Young LLP (“EY” or “we”).

The personal data you provide as part of the Services may be shared by EY with one or more member firms of EYG (see “Who can access your information” section below).

Information collected as part of the Services is hosted on EY servers located in the U.S.

3. Why do we need your information?

EY uses your information in connection with the financial planning services we provide to verify your identity, access your FRS record, respond to questions you have about your retirement plan, and maintain the quality of the services we provide.

4. What type of personal data do we process?

EY receives the following information from MyFRS via an automated feed:

- Unique ID (last 4 of SSN and month/day of birthday)
- First and last name
- Home address
- Employer name
- Retirement plan name
- Membership class
- Years of service
- Email address
- Phone number

EY may receive additional personal information about your finances from you over the course of a financial planning call. In addition, EY financial planning calls are recorded and EY retains a copy of the recording.

5. Who can access your information?

Your personal data is accessed by EY Financial Planning personnel located in the US for the purpose of providing financial planning advice to you.

Additionally, in connection with scheduling a financial planning appointment via MyFRS.com, the following information will be shared with EZappt. [Click here](#) to access EZappt’s privacy notice.

- Last 4 of SSN
- Date of birth
- First and last name
- Email address
- Phone number
- Zip code

It is our policy to only use third-party service providers that are bound to maintain appropriate levels of data protection, security and confidentiality, and that comply with any applicable legal requirements.

The access rights detailed above involves transferring personal data in various jurisdictions in which EY operates (EY office locations are listed at www.ey.com/ourlocations). EY will process your personal data in accordance with applicable law and professional regulations in your jurisdiction. Transfers of personal data within the EY network are governed by EY's Binding Corporate Rules (www.ey.com/bcr).

6. Data retention

In connection with the Services, EY will retain your personal information for a period of 7 (seven) years from providing you financial planning advice. Your personal data will be retained in compliance with privacy laws and regulations, and at the end of the 7-year data retention period, your personal data will be deleted.

7. Security

EY is committed to making sure your personal data is secure. To prevent unauthorized access or disclosure, EY has technical and organizational measures to safeguard and secure your personal data. All EY personnel and third parties EY engages to process your personal data are obliged to respect your data's confidentiality.

8. Controlling your personal data

EY will not transfer your personal data to third parties (other than any external parties referred to in section 6 above) unless we have your permission or are required by law to do so.

You may be legally entitled to request details of EY's personal data about you.

To confirm whether your personal data is processed in connection with the Services or to access your personal data, contact your EY financial planner or email your request to privacy.office@ey.com.

9. Rectification, erasure, restriction of processing or data portability

You can confirm your personal data is accurate and current. You can request rectification, erasure, restriction of processing or a readily portable copy of your personal data by contacting your EY financial planner or emailing your request to privacy.office@ey.com.

10. Contact us

If you have additional questions or concerns, contact your EY financial planner or email your request to privacy.office@ey.com