

**The New York State Society of Certified Public Accountants
Operations Policies**

OP – 23 – Sharing of Personal Data

This Policy is intended to comply with the New York Stop Hacks and Improve Electronic Data Security Act (“SHIELD Act”) and is further intended to facilitate the administration of our Members’ express consent to certain communications.

For purposes of this Policy, both the terms “personal information” and “private information” shall have the same meanings that such terms have in the SHIELD Act.

To the fullest extent possible under the circumstances, the Society and its affiliates shall limit sharing any private information of its members, prospects, or employees.

Data to be shared shall be referred to in this Policy as “Personal Data.” No Personal Data shall be shared with any person except as expressly provided in this Policy.

A. Vendors

Vendors shall have access to Personal Data only on a need-to-know basis, which Personal Data shall only be shared pursuant to a Non-disclosure Agreement in a form acceptable to NYSSCPA Counsel (“NDA”) signed by the vendor. Such NDA shall require that the Vendor destroy the Personal Data after each use.

B. Chapters

Subject to an NDA, Chapter Executive Boards will be routinely sent the names, emails, and phone numbers of new members each month.

In addition, Chapter Presidents or Secretaries may obtain Personal Data only for the members and prospects in the applicable Chapter. The person requesting the Personal Data shall execute a separate NDA for each request. Such NDA shall require that the person requesting the Personal Data destroy such Personal Data after each use.

Chapter Event Planning Committee Chairs may obtain Personal Data of prior attendees of similar events, as well as those who have never attended, in an effort to increase registration. Such Personal Data shall be limited to names, email addresses, and phone numbers. The person requesting the Personal Data shall execute a separate NDA for each request. Such NDA shall require that the person requesting the Personal Data destroy such Personal Data after each use.

C. Statewide Committee Chairs

Society Committee Chairs may obtain Personal Data only for the members of the applicable committee. Such Personal Data shall be limited to names, email addresses, and phone numbers.

D. Event/Conference/Webinar Sponsors

Except as provided in Section B, Sponsors of events, conferences, or webinars (collectively, “Events”) may obtain Personal Data for members participating in such Events, as well as those who have previously participated in similar Events, provided that sponsors shall only receive the Personal Data of members who have opted in to sharing such Personal Data.

E. FAE Instructors

On request, FAE Instructors may obtain Personal Data limited to the names and employers of course attendees.