



Partners

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Electronic Data Exchange Agreement

Terms of Use

Please read the following terms of use to proceed with transferring electronic information via the Internet. The transfer of information is done using a Client Web Portal (the Portal). By signing this agreement, you are agreeing with and are bound by the terms of use. The Portal is provided for the purpose of electronic data exchange only and is for your benefit, to facilitate your ease and access to information. The use of this service is subject to the terms of use.

Security

We have taken steps to ensure that we use recommended security techniques and standards to protect the Portal site. Please be aware that no electronic data exchange can be guaranteed to be completely secure. You are responsible for ensuring that your own computer is secure. To access the Portal, you have to provide log in user and password information. These make up your electronic authentication.

Make sure that you keep each piece of information confidential so that others cannot access your electronic authentication. Please advise us if you require additional users under your Portal folder.

While Foundations LLP has taken all reasonable efforts to ensure the security of information on our Portal, **we are not liable for any damages that may arise as the result of interception, loss, theft or other action or difficulty and you waive our liability in this respect.** After using the Portal, you should clear the browser cache as information stored in the browser cache isn't encrypted. By clearing it, you will help to ensure that others can't compromise your data.

Privacy and Confidentiality

As Chartered Professional Accountants, Foundations LLP are governed by Rules of Professional Conduct. Information will be retained and disclosed in accordance with the conditions listed therein.

Under the provisions of the Privacy Act, individuals have the right to protection of, and access to their personal information.

Folders on the Portal:

- Folders with your name are private folders and you are the only member of your organization who has access to this folder.
- Public folders are available to ALL users that have access to your portal.
- All employees of Foundations LLP have access to ALL folders.

Users of the Portal will continue to have access to the Portal until Foundations LLP is notified by you to remove a user. You are responsible to update us on any changes to authorized users in the event of divorce or employee termination.

You have the right to withdraw your consent to use the Portal at any time.

Use of Information

The information contained on the Portal is not intended to provide individuals with specific technical, legal, accounting, financial or tax advice and should not be relied on for those purposes.



Accuracy and Changes

The information on the Portal is believed to be accurate, however, its accuracy and completeness is not guaranteed. Changes may be made to the information at any time, without previous notice.

Limitation of Liability

Foundations LLP is not responsible for direct, indirect, special or consequential damages arising, in any manner, from the use of, or inability to use this Portal, even if advised of the possibility of such damages and all such liability is waived by you.

Document Back-up

If you choose to access any documents through the Portal, you should take reasonable and appropriate precautions to scan for computer viruses and to ensure the software’s compatibility with your computer system. You should also make sure you have a complete and current back-up of the information contained on the Portal.

The Portal is not intended as an electronic storage facility and as such, data will be retained for 30 days only. It is your responsibility to download, save and/or print any documents you wish to keep for future use.

_____ on behalf of _____

Name of Individual

Name of Business if applicable

Signature

Date

Authorized portal users are:

Name

Email
