



THE HELEN BROWN GROUP

Celebrating 20 Years

HBG Consulting Agreement Privacy Policy & General Disclaimer

Last Modified May 15, 2025

This Privacy Policy describes how The Helen Brown Group, LLC (“Helen Brown Group”, “HBG”, “we,” “us,” or “our”) may collect, use, and disclose information, including Personal Information which is any information that relates to an identified or identifiable natural person, or as otherwise defined under applicable law (“Personal Information”), gathered when you engage HBG to provide consulting services (“Consulting Services”).

Please read this Privacy Policy carefully. By using the Consulting Services, you represent have read, understood, and agree to be bound by the terms of this Privacy Policy and consent to HBG’s collection, use and disclosure of Personal Information as set forth herein. If you are accepting this Privacy Policy for an entity, such as the organization you work for, you represent that you have the authority to bind that entity and you agree that “you” as used in this Privacy Policy includes both you personally and the entity you represent. **If you do not consent to the terms of this Privacy Policy, you should not use the Consulting Services in any way.**

Privacy Policy Updates

We may periodically revise this Privacy Policy at any time and will post the revised Privacy Policy on our website, www.helenbrowngroup.com. The original Privacy Policy will remain applicable to you for the term of your current agreement for Consulting Services. The revised Privacy Policy will become applicable to you upon extension or renewal of your current agreement for Consulting Services or upon the effective date of a new agreement for Consulting Services. Your continued use of the Consulting Services after the revised Privacy Policy becomes applicable to you means that you consent to and accept the revised Privacy Policy.

Collection of Information

We collect Personal Information and other information that you provide to us and that we obtain from other sources.

Information You Provide

We collect Personal Information that you provide to us when you contact us to engage our Consulting Services including:

- Name;
- Organization;
- Title;
- Address;
- E-mail address; and
- Telephone number.

Donor Information Obtained From You and Other Sources

We collect Personal Information and other information about your donors and potential donors (“Donor Information”) from you and from publicly available sources, including free and paid subscription services.

This Personal Information and other information may include, but is not limited to:

- Identifying information – e.g., first name, last name, nickname;
- Spouse identifying information - e.g., spouse’s first name, last name, nickname;
- Contact information - e.g., physical and mailing addresses, telephone numbers, email addresses;
- Employment information - e.g., organization, title;
- Educational information - e.g., degrees, athletics, organizations scholarships;
- Giving data - e.g., gift amounts, gift history
- Family (demographic) information - e.g., marital status, children;
- Constituent types - e.g., board member/trustee information;
- Organization engagement - e.g., volunteer status, online engagement, event participation;
- Prospect development - e.g., capacity rating, target asks, personal visits, proposals;
- Wealth screening - e.g., financial asset information; donations to other organizations;
- Member/Arts organizations - e.g., membership and engagement information;
- Health care organizations - e.g., number of visits, departments, physicians, insurance information.

You are responsible for complying with all applicable laws when providing Personal Information, Donor Information and other information to HBG, including obtaining any required consents and authorizations (including consents for the collection and processing of the Personal Information of children), and providing any required notices in accordance with applicable data protection legislation or regulations. For the purposes of the GDPR and other applicable data protection laws, HBG acts as a data processor on your behalf and relies on the consents that you obtain in order to process Personal Information. For purposes of HIPAA, we rely on you to send us only HIPAA compliant data and to confirm acceptable data usage with your internal compliance team.

How We Use Personal Information

HBG uses the information collected, including Personal Information, for a variety of purposes. For example, HBG may use your Personal Information to:

- Provide the Consulting Services and other services you request;
- Operate and improve the Consulting Services;
- Send you e-mails related to the Consulting Services;
- Send you invoices;
- Notify you about certain changes to the Consulting Services including changes to this Privacy Policy;
- Protect our rights, privacy, safety and property and the rights, privacy, safety and property of others;
- In other ways for which we provide specific notice at the time of collection.

HBG uses Donor Information to provide the Consulting Services and other services you request and may also use it to protect our rights, privacy, safety and property and the rights, privacy, safety and property of others, and in other ways for which we provide specific notice at the time of collection.

Sharing Personal Information

We may share your Personal Information as follows:

Service Providers

We may share your Personal Information with certain trusted third parties that we engage to perform functions and provide services to us, including, without limitation, payment processing, website management, database storage and management, customer relations and support, data analysis, and marketing and social media services.

We may share Donor Information with certain trusted third parties that we engage to perform functions and provide services to us for the purpose of conducting the Consulting Services for which you have engaged.

Other Third Parties

We also may share your Personal Information, including Donor Information, with third parties as follows:

- to satisfy any applicable law, regulation, legal process or governmental request;
- to detect, prevent or otherwise address fraud, security or technical issues;
- to prevent a crime or protect national security;
- to protect the rights, property or safety of us, our users or others; or
- in connection with a financing or a sale, acquisition, merger, restructuring or any other transaction involving a change of control in our business, including but not limited to a bankruptcy or similar proceeding.

We may disclose your Personal Information, including Donor Information, to third parties if you have consented to it or if there are other legal grounds for it.

How Long Do We Keep Your Personal Information

We will retain your Personal Information for as long as necessary to fulfill the purposes for which it has been collected. We will also retain and use your information as necessary to comply with our legal obligations, resolve disputes, and enforce our agreements. We may indefinitely retain information that does not identify you.

Security

Helen Brown Group strives to use appropriate security measures and to use service providers that follow industry standards to protect the privacy and security of Personal Information we collect and process. However, no method of transmission over the Internet, or method of electronic storage, is 100% secure, and we cannot guarantee the security of Personal Information, or that unauthorized access, hacking, data loss or other breaches will never occur. WE EXPRESSLY DISCLAIM ANY REPRESENTATION OR WARRANTY, WHETHER EXPRESS OR IMPLIED, WITH RESPECT TO ANY BREACHES OF SECURITY, DAMAGE TO YOUR DEVICE, OR ANY LOSS OR UNAUTHORIZED USE OF YOUR PERSONAL INFORMATION OR OTHER DATA.

Third Party Websites

HBG uses third parties, such as Dropbox or Sharepoint, to provide the results of our Consulting Services to you. These third parties may install “cookies” on your device or use similar technologies such as pixels, web beacons, access logs, or software development kits to automatically collect Personal Information and other information related to your online activities.

Cookies are small files that are stored on your computer. The following types of Cookies may be used: (i) strictly necessary Cookies which are necessary for the online services to function; (ii) analytics cookies which count visits and traffic sources to allow for measurement and improvement of online services; and (iii) advertising cookies which may be used to build a profile of your interests and show you relevant ads.

Most browsers provide you with the ability to block, delete, or disable cookies. Alternatively, you can control some 3rd party cookies by using a privacy enhancement platform such as optout.aboutads.info or youronlinechoices.com. If you choose to reject cookies, some features and functionality of the online services may be limited or unavailable. If you would like to learn more about cookies, please refer to the following website: <http://www.allaboutcookies.org/>

Please note that this Privacy Policy does not apply to Dropbox, Sharepoint or other such third party websites and applications. HBG is not responsible for the practices and policies, including privacy practices and policies, of such third parties. Therefore, you should review the privacy practices and policies of such third parties prior to providing your Personal Information and other information in connection with such websites and applications.

International Data Transfer

By using the Consulting Services, you acknowledge and agree that HBG controls and operates all parts of the Consulting Services from its offices in the United States of America. If you access the Consulting Services from outside the United States, you acknowledge and agree that your Personal Information, including Donor Information, may be transferred to and maintained on computers and servers located in a jurisdiction where the privacy laws may be different from those in your jurisdiction. If you choose to use the Consulting Services, you agree that you are responsible for complying with all applicable laws regarding the transfer of Personal Information, including Donor Information, to the United States, and freely and specifically consent to such transfer and the collection, use and potential disclosure of such information in accordance with United States law and this Privacy Policy.

General Use Disclaimer

HBG consultants provide services consistent with the degree of care customarily exercised by professionals within our industry. All HBG deliverables are prepared using publicly available sources, and every reasonable effort is made to ensure the accuracy and relevance of the information presented. HBG provides no guaranties as to any results to be achieved through the use of our services or as to any particular outcome, and any and all warranties of merchantability or fitness for a particular purpose are expressly disclaimed. We are not responsible for omissions, errors, or incorrect data supplied by public sources, by Client, or by our other third-party resources.

Any and all intellectual property rights inherent in any deliverables provided by HBG to Client remain vested in HBG, and no ownership of any intellectual property rights is transferred. HBG does not grant exclusivity to any client, and nothing prevents, impairs or inhibits the ability of HBG to provide services to any other entity.

All deliverables should be treated as confidential and are intended solely for internal use by authorized personnel of the client organization.

Contact Information

If you have questions about this Privacy Policy, please contact Melissa Bank Stepno, President & CEO at privacy@helenbrowngroup.com or 617-393-1983.