

# FactSet Add-In for Microsoft Office for Web Privacy Policy

Last Revised March 2020

## Introduction

Thank you for selecting the FactSet Add-In for Microsoft Office for Web (the “Add-In”). FactSet is a provider of integrated financial information and analytical applications to the global investment community. To protect your privacy better, FactSet wants you to know how we collect your information, the types of information we collect, how we use and share your information and what choices you can make about the way your information is collected and used.

This policy applies to information you provide to us and we collect through your use of our Add-In.

## Collection and Use of Personal Information

We collect several types of information from and about users of our Add-In, including information:

- by which you may be personally identified, such as name, postal address, email address, telephone number, etc. ("personal information");
- about your internet connection, the equipment you use to access our Add-In and usage details (“usage information”).

We collect this information:

- directly from you when you provide it to us;
- automatically from data collection tools such as cookies as you use the Add-In.

## How We Use your Personal Information

To provide you with a better user experience:

- troubleshooting and user support;
- understanding which features are most and least used to make improvements to and provide new functionality in our Add-In.

To conduct our business:

- conduct product research for future Add-In enhancements or additional products;
- employee development;
- fulfill legal obligations and cooperate with law enforcement investigations;
- Analyze product performance.

We reserve the right to disclose, share and/or otherwise transfer personal information and usage information, in connection with a corporate merger, acquisition, consolidation, the sale of a portion of our business or the sale of substantially all of our assets, or other fundamental corporate change, whatever form it may take. You will be notified via e-mail or prominent notice on our website prior to a change of ownership or control of your personal information or usage information, if your personal information or usage information will be used contrary to this policy.

## **Use of Cookies and Other Electronic Tools for Automatic Data Collection**

The technologies we use for automatic data collection may include:

1. **Cookies (or browser cookies).** A cookie is a small file placed on the hard drive of your computer. You may refuse to accept browser cookies by activating the appropriate setting on your browser. However, if you select this setting you may be unable to access certain parts of our Website. Unless you have adjusted your browser setting so that it will refuse cookies, our system will issue cookies when you direct your browser to our Website.
2. **Flash Cookies.** Certain features of our Website may use local stored objects (or Flash cookies) to collect and store information about your preferences and navigation to, from, and on our Website. Flash cookies are not managed by the same browser settings as are used for browser cookies.
3. **Web Beacons.** Pages of our Website and our emails may contain small electronic files known as Web beacons (also referred to as clear gifs, pixel tags, and single-pixel gifs) that permit the Company, for example, to count users who have visited those pages and for other related website statistics (for example, recording the popularity of certain website content and verifying system and server integrity).

## **We Do Not Sell or Share Your Personal Information**

The personal information we collect through your registration for and use of our Add-In is used solely by us. We do not sell your personal information and we do not share it with third parties.

## **Access to Personal Information**

FactSet will enable you to access your personal information held by us and you will be able to correct, amend, or delete that information where it is inaccurate, except (1) where the burden or expenses of providing access would be disproportionate to the risks to your privacy in the case in question, or (2) where the rights of persons other than you would be violated. If you wish to access your personal information we hold, you may do so by contacting FactSet's Compliance Officer using the contact information provided below.

## **Data Security**

FactSet takes reasonable precautions to protect personal information from loss, misuse, unauthorized access, disclosure, alteration, and destruction. Unfortunately, while we work hard to

ensure the security of your personal information while it is on our systems, no security measures are perfect, and data transmitted over the Internet cannot be guaranteed to be 100% secure. We cannot and do not ensure or warrant the security of any information you transmit and you do so at your own risk.

FactSet is a global company. To offer our services, we may need to transfer your information among several countries, including the United States, where we are headquartered. For information collected from residents of EU member states, FactSet complies with the Standard Contractual Clauses as set forth by the EU regarding the collection, use, and retention of data from the EU. FactSet intends to comply with future EU laws related to the transfer of data outside of the EU.

For information collected regarding residents of EU member states, FactSet agrees to cooperate with the Data Protection Authorities located in the EU member states in resolving any individual complaints or disputes with regard to this Privacy Policy and the European Commission's Directive on Data Protection.

### **Changes to Our Privacy Policy**

This Privacy Policy may be amended from time to time. Please review it periodically. Changes to this Policy will be effective upon posting to this Website. Your use of the Add-In following these changes means that you accept the revised policy.

### **California Consumer Privacy Act**

If you are a California resident, we process your personal data in accordance with the California Consumer Privacy Act (CCPA). This CCPA section of our Privacy Statement contains information required by the CCPA and supplements our Privacy Policy.

#### **Sale of Personal Data**

FactSet does not sell your personal data.

#### **Access Rights**

California residents have the right to request that we explain to you what personal data of yours we collect, use, disclose, and sell, and upon your request, that we delete your personal data. You may make these requests yourself or through an authorized agent. FactSet will verify the legitimacy of the request prior to responding.

You have a right not to receive discriminatory treatment if you exercise your CCPA rights. We will not discriminate against you if you exercise your CCPA rights.

**Personal Information Processing.** Of the Eleven Categories of Personal Data listed in the CCPA, we collect:

<b><u>Personal Information Category</u></b>	<b><u>Source</u></b>	<b><u>Purpose</u></b>	<b><u>Recipients</u></b>
Identifiers: name, address unique personal identifier, internet protocol (IP) address, email address, phone number, account name, job title, industry, employer.	Provided by users' when downloading the Add-In.	To provide user support and improve user experience with the Add-In.	FactSet does not sell or share your personal information with third parties
Inferences drawn from personal information: Information is used to create a profile of Add-In users' preferences for different functionalities	Users' interactions with the Add-In.	To improve user experience by augmenting and improving most-used features and functions.	FactSet does not sell or share your personal information with third parties

**How to Contact Us**

If you have any questions or comments about this Privacy Policy, FactSet's privacy practices, you would like to exercise your access rights, or if you would like us to update information or preferences you provided to us, please contact us at:

Compliance Office  
 FactSet Research Systems Inc.  
 45 Glover Ave  
 Norwalk, CT 06851  
 USA  
[compliance@factset.com](mailto:compliance@factset.com)