



## PRIVACY POLICY

### Definitions

“Act” means Oregon Revised Statutes 178.200 to 178.245, as amended from time to time.

“Board” means the Oregon Retirement Savings Board established under the Act.

“Code” means the Internal Revenue Code of 1986, as amended, and any regulations, rulings, announcements, or other guidance issued thereunder, as amended.

“Program” means OregonSaves.

“Program Administrator” means Ascensus College Savings Recordkeeping Services, LLC, a third party administrator chosen by the Board to assist in carrying out the requirements of the Act.

“Program Rules” means the administrative rules for the Program set forth in the Oregon Administrative Rules, chapter 170, division 200, including any temporary rules and as amended from time to time.

“OregonSaves Account” means a Roth IRA or a Traditional IRA (if such option becomes available under the Program) established by or for an eligible employee under the Program.

**Confidentiality of OregonSaves Account Information.** Individual OregonSaves Account information, including but not limited to names, addresses, telephone numbers, personal identification information, amounts contributed and earnings on amounts contributed, is confidential and will be maintained as confidential:

- except to the extent necessary to administer the Program in a manner consistent with the Act, the tax laws of Oregon and the Code; or
- unless the person who provides the information or is the subject of the information expressly agrees in writing that the information may be disclosed.

**Written Release.** The Board may disclose your OregonSaves Account information to other persons or entities to the extent authorized by you in a written signed release provided to the Board. For purposes of this paragraph, “OregonSaves Account information” includes information pertaining to (i) your IRA account, (ii) beneficiary designations, (iii) distributions, or (iv) other information contained in any applicable court order. A written authorization to release information is valid until the earlier of (a) the date you provide the Board with a signed revocation of such authorization or (b) the end date, if any, specified in the original authorization.

**Subpoena or Court or Other Governmental Order.** As part of Program administration, the Board may disclose your OregonSaves Account information as required by a valid and applicable subpoena or court or other governmental order.

**Other Disclosure Necessary to Administer Program.** The Board may disclose information that it is required to disclose under the Oregon Public Records Law or other applicable law. The Board may also disclose anonymized data which does not include information that is identifiable to an individual employee or employer for purposes of research associated with the Program. The Board may disclose OregonSaves Account Information to the Program Administrator, the providers of investments for the Program, regulatory agencies to the extent disclosure is required by law, and to other persons or entities to the extent the Board determines disclosure is necessary or appropriate to administer the Program.

**Web Analytics.** The Board and the Program Administrators may use web analytics services. Such services may include the use of technologies on the OregonSaves website, including: “cookies” and web beacons, which are used to collect data on the web pages a user visits and the features a user uses. The information about users’ use of the website (including IP address) may be transmitted to and stored by a web analytics services provider for the purpose of evaluating and/or recording users’ use of the website, compiling reports on website activity for website operators and providing other services relating to website activity and internet usage. Web analytics may be used to gain insights about how to improve the functionality and user experience of the website. Web analytics service providers may also transfer this information to third parties when required to do so by law, or to process the information on the web analytics service provider’s behalf. If you have set your browser to warn you before accepting cookies, you will receive the warning message with each cookie. You can refuse cookies by turning them off in your browser. However, doing so may limit your access to certain sections of this website.