

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

OP – 23 – Sharing of Personal Data (Revised July 14, 2025)

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 annual NDA, Chapter Executive Boards will be routinely sent the names, emails, phone numbers, firm or company affiliations, and membership types of new members each month.

Also subject to the annual NDA, Chapter Executive Boards will be allowed to receive annually a listing of Chapter members including names, emails, phone numbers, firm or company affiliations, membership types and number of years of NYCPA membership.

In addition, Chapter Executive Board members or other Chapter Board designees, may obtain Personal Data only for Chapter members, prospects, and Chapter event attendees, both social events and educational events, in the applicable Chapter. The person requesting the Personal Data shall execute an annual NDA. Such NDA shall require that the person requesting the Personal Data destroy such Personal Data at the end of each NYCPA fiscal year.

Chapter CPE and 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 an annual NDA. Such NDA shall require that the person requesting the Personal Data destroy such Personal Data at the end of each NYCPA fiscal year.

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.

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.

D. FAE Instructors

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

E. Community and Conference Chairs

On request, Community and Conference Chairs may obtain Personal Data limited to the names and contact information of community members and conference attendees, respectively. Personal data thus obtained may be used by Community Chairs solely for the purpose of communicating with members regarding community matters, and by Conference Chairs solely for the purpose of communicating with current, past and prospective attendees regarding the conference in question. Conference Chairs may send up to three communications per event via emails to be sent out by FAE or Society staff on their behalf, and shall coordinate the timing of each such communication with FAE or Society staff. Each email shall provide for an option to opt out of further communications, and requests to opt out shall be honored by the Conference Chair. For the avoidance of doubt, this paragraph shall not limit the ability of Community and Conference Chairs to use the Exchange as a means of communication that is supplemental to this.

Approved, Board Meeting of March 24, 2023, Agenda Item #B23-A-1.e; amended, Board Meeting of July 14, 2025, Agenda Item #B25-B-1.b.; amended, Board meeting of November 17, 2025, Agenda Item #B26-G-1.b.