

We gather information on you in order to...

- identify you in an appropriate manner, in accordance with provisions of laws;
- protect you and us against error and fraud;
- better understand your investment needs, so that we can recommend products and services that meet your needs;
- comply with various legal requirements and regulatory.

If you are an individual, the Income Tax Act and securities regulations require that we ask for your social insurance number and a photo ID when opening an investing account.

Count on us to protect your privacy

We do not collect, use, or disclose personal information only for the purpose of a reasonable individual would consider appropriate in the circumstances. We do not sell your personal information to third parties. We need to get your permission expressly in writing before obtaining or using information about you or disclose it to anyone else (except as required or permitted by law or where a regulatory authority of a territory where we operate on demand).

Only authorized personnel has access to your personal information. Our methods and systems are designed to protect your information from an error, loss or unauthorized access. Our employees are required to maintain the confidentiality of all personal information to which they have access. They are also required, as a condition of employment, to sign a confidentiality agreement that requires their responsibility in this regard. We keep your personal information only during the period required by applicable laws and regulations, and we monitor our compliance while enforcing the provisions of laws on privacy protection.

We can examine and analyze the use you make of our products and services, as well as the operations made in your accounts, in order to better protect them from unauthorized use. So we can serve better you and keep you informed of other products and services that can help you achieve the financial goals you have formulated.

You can review your personal information and correct them

You can review the personal information that Portfolio Management Inc. holds concerning you and correct them. We may ask you to formulate your request in writing. We will respond to this request within the next 30 days. If we needed more time or should we refuse your request, we will provide you with an explanation, subject to applicable legal restrictions.

Our chief compliance officer, responsible for confidentiality, will be happy to help you.

You can choose not to receive direct advertising communications

Occasionally, Pratte Portfolio Management can provide you with alternative investment and products and services offered. In order to do this, we could use direct mail, email, phone or take other avenues. If you don't want to receive messages of this subject, please contact our Chief Compliance Officer.

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