



Privacy Policy & Cookie Statement

PocketCFO

PocketCFO.io respects the privacy of their customers, prospects and visitors to this website and ensures that the personal information you provide is treated confidentially. Below you can see how your personal data is handled. We process your personal data as a data controller in line with the General Data Protection Regulation (GDPR).

Our contact details:

PocketCFO.io is a brand of The Financial Insights Company B.V.

Europalaan 93

3526KP Utrecht

The Netherlands

hello@pocketcfo.io

Chamber of Commerce (KvK): 94 36 58 49

Processing of personal data

If we offer services to you (via a partner) or if you share (personal) data with us in another way, we will process this data in our systems.

In order to honour the contract between you and us, it is necessary for us to process your personal data. This may also be necessary in the run-up to the conclusion of that contract. In that case, we may receive your personal data from a partner with whom we work, such as an accounting firm. If you have any questions regarding such provision of data, please contact the partner from whom we receive your data.

In addition to the contract we have with you, we are also required by law to process certain personal data about you. In certain situations, we may require your permission or that we have a legitimate interest in processing your personal data. If the latter is



the case, your interests will always be considered. Legitimate interest can consist of the processing of your personal data for the prevention of fraud, but also in some situations regarding our marketing activities.

In addition to the personal data described above, we may also collect and process business documents, such as sales invoices, receipts, expense invoices, and other financial records, as part of our expanded services. We collect these documents to provide accurate and efficient financial analysis, reporting, and insights to our clients. These documents may contain personal data, such as names, addresses, and financial details.

We process your personal data for the following purposes:

- Handling contact requests that we receive through our website
- Drawing up offers and contracts
- Carrying out marketing activities
- Invoicing and administrative purposes
- To be able to send you notifications
- To comply with various legal obligations
- Optimizing, improving and securing our website
- Generate insights, forecasts and benchmarks for you

The personal data we may process include:

- Your first and last name
- Your address
- Your telephone number
- Your email address
- Your date of birth
- Your business details, such as company name, address, business activities, Chamber of Commerce, Bank Accounts
- Financial data
- Business documents, including but not limited to sales invoices, receipts, expense invoices, and other financial records



When do we collect your Personal Data?

You agree that PocketCFO can collect and process your Personal Data in the following situations:

- When you are browsing the Website or our Application. We have set up some audience measurement tools in order to better understand and interact with Users. Those tools may also collect some Personal Data about you.
- When you contact us for any reason (chat, call, etc.): In this situation, some Personal Data may be requested from you so we can respond.
- When you subscribe to a PocketCFO service. You will also be asked to provide your Personal Data so that service can be properly provided. For instance, your Personal Data will be required so that you can log into your PocketCFO account or lodge a technical support request.

Storage periods

We do not store personal data any longer than necessary. This may be for a specific purpose or because the law requires it. Normally, this is up to five years after our service to you has ended. Some personal data must be kept for seven years to comply with Dutch tax law.

If you fill in the contact form on our website or send us an email, the data you send us will be kept as long as it is needed to fully answer and process your request.



Your rights

Under the GDPR you have a number of rights. You have the right to know which of your personal data we have recorded, for example because you want to check it, correct it, add to it or restrict it. Under certain conditions, you can even have your personal data deleted. In addition, in certain situations you have the right to limit our processing of your personal data or you can request us to transfer your personal data. You also have the right not to be subjected to exclusively automated decision-making.

When your personal data are processed on the basis of consent, you can withdraw your consent at any time. This does not affect our pre-withdrawal processing.

You can also notify us if you no longer wish to allow us, for example, to process your personal data for marketing purposes. After your objection, we will ensure that we do not approach you again regarding other services or products that we are able to offer, over and above what you have purchased from us.

If you wish to exercise any of these rights, please send us a request using the contact details at the beginning of this page. We will then respond within four weeks.

Sharing with third parties

In order to be able to perform our services, it may sometimes be necessary for us to share data, including business documents, with third parties, for example other providers, the partner through whom you were directed to us, valuers, lawyers, regulators etc.

If this happens, it will be to perform the contract we have made with you or because it is required by law. You have the same rights regarding your data that has been provided to third parties, and you can approach them about this.

When we share your data with these third parties, we ensure that your privacy is adequately protected. Thus, we will only provide the necessary data and only for specific purposes. These third parties may also need to share your data with third parties they have engaged, but even in that case your privacy will be adequately



protected. We will never just share your data with third parties. Moreover, your data shall remain within the European Union and the UK.

We may also share your personal data with third parties working on our behalf, such as external Tech vendor(s). We have made a processing agreement with these third parties, which include agreements on how to handle your personal data. The details of these subcontractors may be communicated to the you on request at the following address: hello@pocketcfo.io

Security

We protect the data entrusted to us using technical and organisational security measures in order to minimise the risk of loss, misuse, unauthorised access, disclosure and modification. All employees in our office have signed a confidentiality agreement as well. If you still think that your data has been misused, please contact us using our contact details.

In particular, the security of your Personal Data is ensured by:

- A strict access control policy.
- The use of the TLS protocol to ensure the security of Personal Data in transit.
- The encryption of the Personal Data present via proven algorithms.
- An annual security audit of our services by an independent company.

To reinforce this approach of protection of your Personal Data, it is strongly recommended that you use a password that is long enough and includes several characters, which you are invited to change regularly and keep confidential.



Cookies

We use cookies on our website(s). A cookie is a simple, small file that is sent with pages from this website and is stored by your browser on your computer's hard drive. The information stored in this file can be sent back to our servers on your next visit. This happens immediately when you visit our website.

These cookies are used to improve this website's function and to analyse the use of our website. These functional cookies may be used without your consent. We also use tracking cookies. Tracking cookies are cookies that track visitors as they browse other websites. We ask your consent to place these cookies via our cookie banner.

You can manually delete the cookies placed on your PC, tablet or mobile phone by deleting your browser history (under browser settings). If you decide to delete the cookies in your browser, it is possible that some functions and services on our website will no longer work properly. If you are keen to know more about cookies in general, we refer you to All About Cookies.

If you want to exercise your rights, and it concerns your personal data linked to a cookie, we ask you to attach a copy of the cookie in question. You can find this in the settings of your browser.

Google Analytics

PocketCFO.io also uses Google Analytics to track how users use the website. Google uses this information to track how our website is used, to provide reports about the website to our office, and to provide its advertisers with information about the effectiveness of their campaigns.

Google may also make this information available to third parties where required to do so by law, or where such third parties process the information on Google's behalf. We have no influence over this and are therefore not liable in this respect. You can read more about Google Analytics [here](#), and you can opt out of Google Analytics [here](#) at any time.



Meta / Twitter / LinkedIn

Social media buttons are also on our website. This enables the operators of these services to collect your personal data. You are responsible for clicking on these buttons and thus sharing your personal data with the operators of these services. We have no influence over this, and therefore we are not liable in this respect.

Read the privacy statements of Meta, Twitter and/or LinkedIn to find out what they do with the personal data they collect from you through click buttons.

In case of complaints

If you have a complaint about our processing of your personal data, and we cannot resolve the matter together, you may report the matter to the Dutch Data Protection Authority, Autoriteit Persoonsgegevens:

Postbus 93374
2509 AJ Den Haag
Telephone number: 0900 – 200 12 01
E-mail: info@autoriteitpersoonsgegevens.nl
Website: www.autoriteitpersoonsgegevens.nl

The processing of your complaint is free for you.

Amendment of this privacy statement

We retain the right to change our privacy statement. Visit our website to read our privacy statement on a regular basis to stay up to date.