

Fondation Patrimonia

# Declaration on data protection

## **1. What is this declaration on data protection about?**

We attach foremost importance to transparency in the processing of personal data. Among other things, this declaration on data protection indicates what personal data we collect, for which purpose and with whom we may share it. We regularly check and update this declaration to ensure maximum transparency.

## **2. Who is responsible for processing your data**

The Foundation Patrimonia is responsible for processing your personal data in accordance with data protection legislation.

If you have any questions in connection with this declaration on data protection or the processing of your personal data, you can contact us by:

- E-mail: [dataprotection@patrimonia.ch](mailto:dataprotection@patrimonia.ch)
- Phone: 058 806 08 00
- Postal address: Fondation Patrimonia, Rue Saint-Martin 7, 1003 Lausanne

## **3. What data do we process?**

Personal data is data that can be associated with a specific person. In order to conduct our activities, data may concern insured persons, pension beneficiaries, third parties (family members, for example) or visitors to our website.

The personal data that we may be required to process are, for example:

- Identification data: last name, first name, date of birth, date of death, marital status, common law status, family, language, nationality, place of origin, profession, gender, OASI number;
- financial data: assets, capital, salary, employer's identity, land registry entry, welfare measures, debt collection, income, financial situation, maintenance obligation, recourse against liable third parties, insurance benefits;
- contact details: postal address, e-mail address, IP address, phone number, bank details, place of work.

Where necessary for the implementation of your occupational benefits, we process personal data relating to health, privacy, possible legal proceedings and social welfare measures, which constitute sensitive data within the meaning of the data protection law.

Personal data is primarily provided by you. However, personal data may also be provided by third parties, such as your employer, occupational benefit schemes, authorities or courts. If you provide us with personal data about third parties, we assume that you are authorized to do so and that this data is correct.

---

#### **4. For what purposes do we process your data?**

Your personal data is collected and processed to the extent strictly necessary to manage your occupational pension plan, i.e. your second-pillar insurance. This involves, for example, calculating and collecting contributions, and establishing, calculating and allocating benefits.

---

#### **5. With whom do we share your data?**

Your personal data will not be transferred to third parties, unless this is necessary for the fulfilment of our legal or contractual obligations, or unless you have expressly consented to this.

In particular, your personal data may be transferred to the following categories of recipients: professional associations and trade unions, insurance companies, authorities, lawyers, banks, beneficiaries, compensation funds, brokers, employers, pension fund experts, LOB Substitute Occupational Benefit Institution, LOB Guarantee Fund, occupational benefit schemes, doctors, family members, DI offices, auditors, reinsurers, real estate agencies, legal representatives, courts, notaries, heirs, real estate advisors.

By concluding specific contracts, we may also transfer your personal data to external service providers. These subcontractors are obliged to process your personal data exclusively in accordance with our instructions and to take appropriate measures to ensure data security. By entering into such agreements, we ensure that the protection of your personal data is guaranteed for the entire duration of the processing.

---

#### **6. Will your personal data be disclosed abroad?**

Your personal data will not be disclosed abroad.

---

## **7. How long do we process your data?**

We process your data for as long as required by the purposes of processing, legal retention periods and our legitimate interests in documenting and preserving evidence, or if retention is a technical requirement.

---

## **8. Cookies and other tracking and analysis technologies**

Les Cookies are text files that are sent to your computer or mobile device when you visit our website or access the web portal.

We may use such cookies to recognize the user and to guarantee and optimize site functionality. In this context, we may use web analysis services, which count the number of visitors and provide us with information on their overall behavior.

To do this, we ask for your express permission when you first visit the site.

If you do not wish to receive cookies, you can change your browser settings so that it informs you of the use of cookies, or you can refuse them altogether.

---

## **9. How do we protect your data?**

Nous We take appropriate technical and organizational measures to effectively protect data against unauthorized or unlawful access, and to minimize the risk of loss, destruction or accidental damage. In particular, access to your personal data is restricted to those persons who need to know it in order to implement your pension benefits.

---

## **10. What are your rights?**

You have the following rights in relation to your personal data:

- access your personal data processed by us;
- request the deletion of personal data that is no longer required for the performance of your occupational benefits;
- request the prohibition of specific processing or the disclosure of personal data to third parties;

- have inaccurate or incomplete personal data rectified;
- receive personal data in a commonly used electronic format;
- withdraw your consent, as far as the processing is based on consent.

Please note that the exercise of these rights is not unlimited and may be subject to conditions, exceptions and restrictions in certain circumstances in accordance with applicable data protection legislation (e.g. to safeguard interests worthy of protection or to comply with legal obligations).

If you have any doubts about the lawfulness of processing, you can also contact the Swiss Federal Data Protection and Information Commissioner.

---

## **11. Entry into force and final provisions**

This declaration on data protection comes into force on 01.09.2023.

The Foundation Patrimonia may amend its provisions at any time.

Any dispute relating to the processing of personal data by the Foundation Patrimonia shall be governed exclusively by Swiss law.



Correspondence address

**Fondation Patrimonia  
Rue Saint-Martin 7  
CH-1003 Lausanne**

Registered office

**Fondation Patrimonia  
Le Lumion  
Rte François Peyrot 12  
1218 Le Grand-Saconnex**

**T +41 58 806 0800  
[www.patrimonia.ch](http://www.patrimonia.ch)**