



Privacy Compliance

The best way to keep a secret is to have no secrets

The financial industry is increasingly focused on privacy and the control of personal data, and EVP Office is already **compatible with PII, SPI, GDPR, and CCPA Personal Data** regulations and corporate policies—it **does not (and never has) send or store private information off-site.**

Private Data Remains Local to Your Network

Detailed client information is entered into EstateVal and GiftVal, but it is never transmitted to or stored on EVP Systems' servers; your sensitive data remains with you.

Security Identifiers and a Date Are All That's Sent

During an evaluation, only the CUSIPs, SEDOLs, and tickers that describe holdings, and the date of their pricing, is transmitted—not even lot sizes or transactions are sent.

PII, SPI, GDPR and CCPA Personal Data-Compatible

Personally identifiable information (PII), sensitive personal information (SPI) and personal information as defined by the European General Data Protection Regulation (GDPR) and the California Consumer Privacy Act (CCPA) are all kept safe by never being transmitted. The most secure data is no data.

