

Firm privacy notice template (for your clients)

Use this in retainers, your website, or a handout. Replace bracketed text. **You** are the organization responsible for the client file. Yuzu Solutions Inc. only hosts the software.

Firm name: [legal name]

Person in charge of personal information: [name] — [email]

Last updated: [date]

1. Who we are

[Firm name] provides Canadian immigration consulting / legal services. We use **Dossierly**, software operated by **Yuzu Solutions Inc.**, to keep your file, questionnaires, documents, appointments, and messages.

Yuzu Solutions Inc. is not your consultant. Questions about your file, fees, or immigration advice go to us. Platform privacy questions can also be sent to Yuzu's Privacy Officer, Adrien Yvin, info@dossierly.ca.

2. What we collect and why

We collect identity and contact information, immigration history, supporting documents (for example a passport), questionnaire answers, notes, and appointment details **to provide the services in our retainer**, to book consultations, to meet College of Immigration and Citizenship Consultants (or bar) duties, and to meet the law.

Some of this information is **sensitive**. We collect it only if it is needed for your file.

If your file includes a **child under 14**, we need authorization from a parent or guardian unless another legal rule applies.

3. Consent

You may refuse to provide information, but we may then be unable to act. You may withdraw consent, subject to professional retention rules and legal obligations.

Optional: if we connect a calendar or meeting tool (Google, Microsoft, or Zoom), that provider will receive appointment details (such as your name, email, and phone). We will not connect those tools to your file without a professional need.

4. Where information is stored

Primary records are stored in Canada. Some technical providers (application hosting, email, and optional calendars, meetings, or payments) may process information outside Québec, including the United States. We have considered that risk as required by Québec Law 25.

5. How long we keep it

We keep a closed file for at least **six years** as typically required for College client-file management, then we destroy or anonymize it when we no longer need it.

6. Your rights

You may request access, correction, a portable copy of computerized personal information, or information about how we handle your data. Write to [firm privacy email]. We aim to answer within 30 days.

You may complain to the Office of the Privacy Commissioner of Canada and, in Québec, to the Commission d'accès à l'information.

7. Incidents

If a confidentiality incident creates a risk of serious injury (Québec) or a real risk of significant harm (PIPEDA), we will notify you and the required regulators.

8. More detail

Yuzu's public policy: [your locale]/privacy on the Dossierly site, or ask us for a copy.