

Data Privacy Statement Website EPS

Data Privacy Statement

1 Responsible for Data Processing

ECOFIN Portfolio Solutions AG
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Authorized representatives:

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Data protection officer:

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Website: www.ecofin.ch/vermoegensverwaltung

2 General Notes on Data Processing

We take the protection of your personal data seriously. All person related data will be treated confidentially and according to the legal requirements (in particular, the EU General Data Protection Regulation – GDPR – and to Swiss Data Protection Act – DPA) as well as according to this Data Protection Statement.

3 Hosting

Our website is hosted by the following provider:

- cyon GmbH
Brunngässlein 12
4052 Basel
Schweiz
- UID: CHE-110.588.943

The hosting provider processes person-related data (e.g. IP-addresses, log-files) in order to ensure the functionality and safety of the website. This takes place on the basis of our legitimate interest (Art. 6, para. 1, lit. f GDPR / Art. 31, para. 1 Swiss DPA).

4 Use of Cookies

On our website we use cookies required for technical functionality and for navigation. These cookies do not save any person related data but serve only the convenient use of the website.

A cookie banner is not provided as long as no consent requiring tracking technologies are employed.

5 Web Analysis Using Google Analytics

This website uses Google Analytics, a web analysis service of Google LLC (USA).

Purpose of this data processing:

- Statistical evaluation of website usage (e.g. numbers of clicks)
- There is **no creation** of user profiles

Legal basis:

- EU: Art. 6 para. 1, lit. f GDPR (legitimate interest)
- Switzerland: Art. 31, para. 2, lit. e DPA

Google is certified under the EU-U.S. Data Privacy Framework. More information under: <https://policies.google.com/privacy>

6 Contact Forms & Newsletters

If you contact us via our contact form or via a newsletter registration, we will process the data you provided (e.g. name, company, e-mail address, telephone number, possibly physical address) for responding to your request or for sending the newsletter respectively.

Distribution of the newsletter is carried out by Mailchimp, a service provided by Intuit Inc. with headquarters in the USA. Mailchimp is certified according to the EU-U.S. Data Privacy Framework.

Legal Basis:

- Art. 6, para. 1, lit. a GDPR (consent)
- Art. 6, para. 1, lit. b GDPR (performance of a contract, if relevant)
- Art. 31, para. 1, Swiss DPA (consent)
- Art. 31, para. 2, lit. a, Swiss DPA (performance of a contract, if relevant)

You can revoke your consent to receiving the newsletter at any time.

7 Embedded Content and Third-Party Services

On our website we embed the services of the following third-party providers:

- Google Maps: presentation of maps to describe the approach to our premises
- YouTube: short videos explaining financial topics
- LinkedIn Plugin: indication of our social media profile.

These providers can record IP-addresses and further user data. By using these services there may be data transfers to third countries (e.g. USA).

Legal basis:

- legitimate interest (Art. 6, para. 1, lit. f GDPR);

- predominant private interest (Art. 31, para. 1 Swiss DPA)
- your consent, if necessary.

8 Transmission of Data to Third Countries

If services like Google or Mailchimp are employed, it is possible that person related data is transmitted to the USA. However, these providers also provide appropriate warranties e.g. by certification under the EU-U.S. Data Privacy Framework.

9 Your Rights

As affected person, you are entitled to the following rights:

- Information on the processing of data
- Correction, deletion or restriction of processing
- Objection to the processing of data
- Revocation of your previously granted consent
- Edition or transfer of data to a third party, if applicable.

Please direct your request to: infoeps@ecofin.ch

In addition, you have the right to file a complaint with the competent data privacy authority.

10 Validity and Changes

This Data Privacy Statement is valid from May 14, 2025.

We reserve the possibility of changes if needed, e.g. if the legal environment changes or if our offer is extended.