Julius Bär
FOUNDATION

DATA PRIVACY DECLARATION OF THE JULIUS BAER FOUNDATION

1. General

The Julius Baer Foundation (hereinafter referred to as the "Foundation") is a non-profit organisation for the purpose of promoting and supporting (i) culture and art in all forms, (ii) science from all faculties and (iii) institutions and events with charitable or social purposes. In order to fulfil these purposes, the Foundation may offer applicants collaboration for various funded projects. However, the Foundation receives a large number of applications, most of which are unsolicited and therefore often do not end up in collaboration. Reference to applicants in the following includes donors respectively.

The Foundation attaches great importance to data protection and provides the following information on the handling of the personal data that it processes in connection with its collaboration with applicants or donors.

2. What does "process" mean?

For the purpose of this Data Protection Declaration, "process" or "processing" shall mean any operation which is performed in relation to personal data, such as collection, access, recording, organization, structuring, storage, adaptation or alteration, retrieval, consultation, use, disclosure by transmission, dissemination or otherwise making available, alignment or combination, restriction, erasure or destruction.

3. Who is responsible for the collection, processing and use of personal data?

Responsible for the processing of personal data:

Julius Baer Foundation
c/o Bank Julius Baer & Co. Ltd.
Bahnhofstrasse 36
P.O. Box
8010 Zurich
Switzerland
Telephone: +41 (0) 58 888 4422
E-mail: foundation@juliusbaer.com

4. Who is the Foundation's Data Protection Advisor?

Applicants may contact the Foundation's Data Protection Advisor as follows:

Julius Baer Foundation
c/o Bank Julius Baer & Co. Ltd.
Data Protection Advisor
Bahnhofstrasse 36
P.O. Box
8010 Zurich
Switzerland
E-mail: dataprivacy@juliusbaer.com

5. What is the purpose of collecting, processing and using applicants' personal data and what is the legal basis for the collection, processing and use of personal data?

The Foundation collects, processes and uses applicants' personal data and/or donors personal data for the following purposes:

Type of personal data	**Purpose of data collection, processing and use**
Personal data (surname, first name, address, date of birth, e-mail address, telephone and fax numbers, tax ID)	Conclusion, execution and fulfilment of a contract; marketing measures (e.g. mention in the annual report or other publications, on the website, in social media, sending of newsletters via e-mail, invitations to events)
Bank details, account/custody account number	Conclusion, execution, and performance of a contract
Identification data (e.g. identity card data) and professional data (e.g. curriculum vitae, references)	Verification of the identity and suitability of the respective applicant for collaboration in relation to the respective project(s) and for the conclusion, execution, and performance of a contract

The Foundation only process personal data based on and in the context of the performance of the underlying contract with applicants or where permitted by applicable laws.
If the Foundation processes personal data based on a specific consent, applicants can refuse or withdraw the consent at any time. The withdrawal of consent will not affect the lawfulness of using the personal data based on the consent before its withdrawal.

If the Foundation intends to process the applicant's personal data for a purpose other than that for which it was collected, it shall inform the applicant of this other purpose prior to further processing and provide the applicant with all other relevant information.

If the Foundation receives unsolicited personal data on an applicant, but no collaboration ensues between the Foundation and the applicant, personal data will be used to safeguard the legitimate interests of the Foundation within the meaning permitted by applicable law or based on regulatory requirements.. The Foundation has an interest in storing the data for the purpose of internal documentation, for the purpose of re-including applications at a later date, if necessary, for the purpose of using the data for studies and surveys, and for the purpose of being able to access past processes in the event of repeated applications.

6. Which source is personal data collected from?

The Foundation collects personal data on applicants not only from the applicants themselves but also from public sources, such as the commercial register and databases of foundations.

7. Who has access to personal data and to which countries does the Foundation disclose personal data?

The Foundation may disclose the personal data to recipients outside of Switzerland, including to countries where Julius Baer Group companies are established or located (see www.juliusbaer.com/en/about-us/our-locations) or to other countries, including EU/EEA member states and other countries with an adequate level of data protection as specified by Switzerland and the EU Commission, or other jurisdictions around the world where any of our service providers, clients and other business partners are located, or where the Foundation executes transactions or provides services. The specific countries where the recipients of the personal data are located may vary as they correspond with the applicable purpose(s) defined in this Statement. Recipients of personal data may potentially forward the information to their branches or group entities, service providers or authorities within and/or outside of their jurisdiction.
Individual countries to which the Foundation transfers the personal data may potentially not have laws that afford the same degree of protection to personal data as in Switzerland. In these cases, the Bank will generally ensure an adequate level of data protection, for example by concluding data transfer agreements with the recipients of the personal data in these countries. These include agreements that have been approved by the European Commission and the Swiss Federal Data Protection and Information Commissioner (FDPIC), known as standard contractual clauses. Applicants can request an example of a data transfer agreement usually utilised by the Foundation by contacting the Data Protection Advisor ("DPA"; see contact details above).
By way of exception, personal data may also be transferred to countries without an adequate level of data protection in other cases, e.g. based on consent, in connection with legal proceedings abroad, or if the transfer is required in order to conclude or execute a contract.

To the extent required by law, the Foundation discloses personal data to supervisory authorities, courts or other competent persons.

8. How long does the Foundation retain personal data?

The Foundation will retain personal data for the period necessary to fulfil the purposes outlined in this Data Privacy Declaration unless a longer retention period is required or permitted by applicable law or based on regulatory requirements.

9. What rights do applicants have concerning their personal data?

To the extent permitted under applicable law, applicants have the right to request access to their personal data, as well as to request their personal data`s rectification if it is incomplete or outdated, its erasure or restriction of the processing. Furthermore, applicants have the right to object to the processing of their personal data, as well as to request a transfer to a determined recipient.
If, despite the Foundation's commitment and efforts to protect personal data, the applicant believes that their data protection rights have been violated, to the extent permitted under applicable law, they have the right at all times to lodge a complaint with The Federal Data Protection and Information Commissioner (FDPIC) being the supervisory authority for Data Protection in Switzerland.

10. Can applicants revoke their consent?

If applicants have given their consent to the collection, processing and use of their personal data, they may revoke their consent at any time, with effect for the future, in written or electronic form. This revocation must be addressed exclusively to the Data Protection Advisor.

11. Are applicants obliged to provide certain personal data?

In order for the Foundation to conclude a contract with an applicant, it requires personal details, identification data and, if applicable, the account details to be used for payment transactions.

If the applicant does not provide the Foundation with the personal data necessary for the execution of the contract, the Foundation may either not conclude a contract with the applicant or may not execute transactions requested by the applicant after conclusion of the contract.

12. Modification of the Data Privacy Declaration

The Foundation may amend this Data Privacy Declaration at any time in accordance with the provisions of data protection law, without having to inform the applicants in advance.
The current version of the Data Privacy Declaration applies in each case.
The applicable version can be found at [https://www.juliusbaer.com/en/julius-baer-foundation/]

Zurich, 1 September 2023