

## **Carter Connects - Privacy Policy**

**Effective Date: July 4, 2026**

Carter Connects ("we," "us," or "our") is a premium professional networking and matchmaking service. We connect founders, investors, executives, and service providers with strategic partners, board and advisory opportunities, warm introductions, and vetted deal flow. This Privacy Policy explains how we collect, use, share, and protect your personal data when you interact with us (including through our landing page, application/registration forms, email, phone, and other communication channels).

This policy is intended to meet the requirements of the UK GDPR and EU GDPR (together, "GDPR"), and applicable UK/EU data protection laws.

### **1. Who We Are (Controller)**

For the purposes of GDPR, Carter Connects is the "data controller" for the personal data described in this Privacy Policy.

### **2. Information We Collect**

We collect information that identifies you or can reasonably be linked to you ("Personal Data"). This may include:

- \* **Identity and Contact Details:** Name, email address, phone number, and (where provided) LinkedIn profile URL or other professional profile links.
- \* **Company Details:** Company name, website, sector/industry, location, role/title, and seniority.
- \* **Professional Details:** Career history, CV/resume details, skills/expertise, board experience, advisory interests, speaking interests, investment background (if relevant), and other information you choose to share.
- \* **Matchmaking Preferences and Criteria:** The types of introductions you want, partnership requirements, investment criteria, deal flow preferences, advisory/board role preferences, and other strategic preferences.
- \* **Communications:** Information you provide when you contact us, respond to messages, or participate in calls (including notes we may take to help deliver the service).
- \* **Usage and Device Data:** IP address, approximate location (derived from IP), browser type, device type, pages viewed, time spent on pages, referral source, and similar usage data.
- \* **Cookies and Similar Technologies Data:** Data collected through cookies and similar tools (see "Cookies and Analytics" below).

We do not intend to collect "special category" data (such as health information, political opinions, religious beliefs, or biometric data) and ask that you do not provide it. If you choose to

share such information with us, we will only process it where permitted by law and where necessary for the purposes you requested.

### 3. How We Collect Information

We collect Personal Data in the following ways:

- \* **Directly from you:** When you register, apply, fill in forms, request introductions, book calls, subscribe to updates, or contact us by email/phone/message.
- \* **From your use of our landing page and communications:** When you browse our site or interact with our emails, we may collect limited usage information (e.g., through analytics and cookies where applicable).
- \* **From professional sources you choose to link or share:** For example, when you provide a LinkedIn URL or share a CV/resume.
- \* **From referrals (with appropriate checks):** Where someone introduces you to us, we may receive basic contact and professional context. We will use it to respond to the introduction and may ask you to confirm your details.

### 4. How We Use Your Information

We use your Personal Data to:

- \* **Provide and run the service:** Create and manage your profile, evaluate fit for the network, and deliver introductions, matchmaking, board/advisory opportunities, referrals, and vetted connections.
- \* **Matchmaking and introductions:** Identify potential matches and share limited, relevant professional details to enable warm introductions (see “Data Sharing”).
- \* **Communicate with you:** Send service messages, respond to requests, arrange calls, share potential matches/opportunities, and provide customer support.
- \* **Improve our service and user experience:** Understand how our landing page and communications perform, improve content, and improve our processes.
- \* **Network integrity and safety:** Vet participants and opportunities, prevent misuse, and keep our community trustworthy.
- \* **Marketing (where permitted):** Send updates about Carter Connects and relevant opportunities. You can opt out at any time.
- \* **Legal and compliance:** Comply with legal obligations, enforce our rights, and handle disputes.

### 5. Legal Bases for Processing (GDPR)

We process your Personal Data under one or more of the following legal bases:

- \* **Performance of a contract (Article 6(1)(b)):** Where processing is needed to provide the services you request or to take steps at your request before providing services.

- \* **Legitimate interests (Article 6(1)(f)):** To operate and improve our service, run our network, communicate with you, and maintain network integrity—provided our interests are not overridden by your rights.
- \* **Consent (Article 6(1)(a)):** Where we ask for your consent (for example, certain marketing communications, or where we decide consent is the most appropriate basis for a specific introduction or sharing).
- \* **Legal obligation (Article 6(1)(c)):** Where we must comply with a legal duty.

Where we rely on legitimate interests, you can object (see “Your Rights” below).

## 6. Data Sharing and Disclosure

We only share your Personal Data when it is necessary for the purposes described in this policy, and we take steps to limit what is shared.

We may share your Personal Data with:

- \* **Potential matches and network members (with consent or at your direction):** Because we provide a matchmaking and introductions service, we may share relevant professional information (e.g., name, role, company, summary of what you are looking for) with a potential match **when you have agreed to the introduction** or have asked us to proceed. We aim to share the minimum details needed to enable a warm introduction.
- \* **Service providers (processors):** Trusted suppliers who help us run our operations (for example, website hosting, analytics, CRM tools, scheduling tools, email/communications tools). They are required to protect your information and only use it for our instructions.
- \* **Professional referrals (with your consent):** If you ask us to connect you with a service provider or decision-maker, we will share the details needed to make that referral.
- \* **Legal and regulatory:** Courts, regulators, law enforcement, or other third parties where required by law or where necessary to protect rights, safety, and security.
- \* **Business changes:** If we are involved in a merger, acquisition, restructuring, or sale of assets, Personal Data may be shared as part of that transaction, subject to appropriate safeguards.

We do not sell your Personal Data.

## 7. Cookies and Analytics

Our landing page may use cookies and similar technologies to:

- \* help the site function properly,
- \* remember preferences (where relevant), and
- \* understand how visitors use the site (analytics).

You can control cookies through your browser settings and (where available) cookie preference tools on our site. Blocking cookies may affect site functionality.

## 8. Data Retention

We keep your Personal Data only for as long as needed for the purposes described in this Privacy Policy, including:

- \* to provide the service and manage introductions,
- \* to maintain appropriate records of our relationship and communications,
- \* to comply with legal, accounting, or regulatory obligations, and
- \* to resolve disputes and enforce agreements.

Retention periods vary depending on the type of data and why we hold it. When we no longer need your data, we will delete it or anonymise it (unless we are required to keep it by law).

## 9. Your Rights (UK/EU GDPR)

If GDPR applies to you, you have rights over your Personal Data, including:

- \* **Right of access:** Request a copy of the personal data we hold about you.
- \* **Right to rectification:** Ask us to correct inaccurate or incomplete data.
- \* **Right to erasure (“right to be forgotten”):** Ask us to delete your data in certain situations.
- \* **Right to restrict processing:** Ask us to limit how we use your data in certain situations.
- \* **Right to data portability:** Receive certain data in a structured, commonly used, machine-readable format and/or have it transferred to another provider (where applicable).
- \* **Right to object:** Object to processing based on legitimate interests, including certain profiling, and object to direct marketing at any time.
- \* **Right to withdraw consent:** Where we rely on consent, you can withdraw it at any time. This will not affect the lawfulness of processing before withdrawal.

To exercise your rights, contact us using the details in the “Contact Us” section. We may need to verify your identity before responding.

You also have the right to lodge a complaint with your local data protection authority. In the UK, this is the Information Commissioner’s Office (ICO): <https://ico.org.uk/>

## 10. Security Measures

We use reasonable technical and organisational measures designed to protect Personal Data against unauthorised access, loss, misuse, alteration, or disclosure. These measures may include access controls, least-privilege permissions, secure systems and tools, staff confidentiality obligations, and vendor due diligence.

However, no method of transmission over the internet or electronic storage is completely secure, so we cannot guarantee absolute security.

#### 11. International Transfers

We are based in the UK/Europe, but some of our service providers may process data outside the UK/EEA. Where Personal Data is transferred internationally, we will take appropriate safeguards as required by GDPR (such as adequacy decisions and/or standard contractual clauses, plus additional measures where needed).

#### 12. Children's Privacy

Our services are not intended for children, and we do not knowingly collect Personal Data from anyone under **\*\*16\*\***. If you believe a child has provided us with Personal Data, please contact us and we will delete it.

#### 13. Updates to This Policy

We may update this Privacy Policy from time to time to reflect changes in our practices, technology, or legal requirements. We will post the updated policy and change the effective date above. If the changes are material, we will take reasonable steps to notify you.

#### 14. Contact Us

If you have questions, requests, or concerns about this Privacy Policy or how we handle your Personal Data, contact:

**\*\*Carter Connects\*\***

Attention: Trevor Carter

Email: [Insert Contact Email]

</legal-document-to-update>

Email: [Insert Contact Email]