

## **The Old Globe's Donor Privacy Policy**

All information concerning donors or prospective donors, including their names, addresses and telephone numbers, the names of their beneficiaries, the amount of their gift, and other details, shall be kept strictly confidential by The Old Globe, its staff and volunteers, unless permission is obtained from donors to release such information.

Adapted from AFP 6/22/18

## **Stock Transfer Information**

### **Financial Institution and Contact:**

The RKG Wealth Management Group  
UBS Financial Services, Inc.  
600 W Broadway, Suite 2100  
San Diego, CA 92101  
Tel: 619.557-4791  
Fax: 877.486.6808  
Toll Free: 800.821.4492  
Attn: Christina Gustin  
Christina.Gustin@UBS.com

### **Globe Account Information:**

The Old Globe  
Account #DG 40442-K2  
DTC #0221  
Federal Tax ID: 95-1543396

## **PCI Compliance (Payment Card Industry)**

The Old Globe is at the voluntary compliance level for accepting and storing customer credit card information and related data.

If data is breached and it was determined that information was breached due to failure to follow standards, the Globe may be subject to fines. The Globe carries insurance that pays for that.

- Never store credit card information in an Excel file
- Never send credit card numbers via email – that includes sending or forwarding pdfs with credit card information. Email is not encrypted.
- Do not email the last four digits of a credit card with the expiration date.
- We do not store the CW or CVC code (Development does not need to request it).
- If you receive an email with credit card information, delete it immediately.
- If you receive credit card information in a pdf, print it out, give it to Diane and delete the email.

- All credit card numbers should be blacked out on RSVP forms, pledge forms, once they are entered.
- If someone calls or emails to make a donation, look at their Tessitura record first to see what credit card we have on file. Have them verbally tell you to charge the credit card. If you write a card number down, give it to Janet immediately.