

Privacy Policy

Effective Date: April 2026

The Fiduciary Institute (“we,” “our,” or “us”) respects your privacy and is committed to protecting the personal information you share with us when you visit our website, use our learning platform, enroll in our programs, or otherwise interact with our services.

This Privacy Policy explains how we collect, use, and safeguard your information across our website (thefiduciaryinstitute.com) and our learning platform (learn.thefiduciaryinstitute.com, hosted by Thinkific). By using our website or learning platform, you agree to the practices described below.

1. Information We Collect

We may collect the following types of information:

Personal Information You Provide: When you create an account, enroll in courses, request information, subscribe to our newsletter, or complete forms, we may collect your name, email address, phone number, billing information, and other details you choose to provide.

Account and Enrollment Information: When you register on our learning platform, we collect information necessary to create and manage your account, including your name, email address, course enrollment history, and progress data.

Automatically Collected Information: Like most websites and online platforms, we collect certain information automatically when you visit, such as your IP address, browser type, device type, operating system, referring/exit pages, and browsing behavior.

Cookies and Tracking Technologies: We and our platform providers (including Thinkific) may use cookies, pixels, and similar technologies to enhance your experience, analyze usage, and support marketing efforts.

2. How We Use Your Information

We use the information we collect for purposes including:

- Providing, personalizing, and improving our courses, resources, and services.
- Managing your account and course enrollments on our learning platform.
- Communicating with you about programs, updates, events, and offers.
- Processing payments and fulfilling your requests.
- Tracking course progress and issuing certificates or credentials where applicable.
- Understanding website and platform usage to improve performance and usability.
- Meeting legal, regulatory, or compliance requirements.

3. How We Share Your Information

We do not sell or rent your personal information. We may share your information in limited circumstances:

Platform Provider: Our learning platform is hosted by Thinkific. When you create an account or enroll in a course, certain information (such as your name, email, and enrollment data) is processed and stored by Thinkific in accordance with their privacy policy.

Service Providers: We work with trusted third-party vendors who assist us in operating our website, processing payments, delivering communications, or providing services. These providers are contractually obligated to protect your information.

Legal Compliance: We may disclose your information if required by law, regulation, legal process, or government request.

Business Transfers: In connection with a merger, sale, or transfer of assets, your information may be transferred as part of that transaction.

4. Your Choices

You have control over your information:

Email Communications: You may opt out of marketing emails by clicking the “unsubscribe” link in our messages. Transactional emails related to your account or enrollment are not subject to opt-out.

Cookies: You can adjust browser settings to refuse or limit cookies, though some features of the website or learning platform may not function properly without them.

Access and Updates: To request access to, correction of, or deletion of your personal information, please contact us at info@thefiduciaryinstitute.com.

Account Deletion: You may request deletion of your learning platform account by contacting us. Please note that deletion of your account may result in loss of access to course content and progress records.

5. Data Security

We use reasonable administrative, technical, and physical safeguards to protect your information. Our learning platform provider, Thinkific, also maintains security measures to protect data processed through their platform. However, no method of transmission over the internet or electronic storage is completely secure, and we cannot guarantee absolute security.

6. Data Retention

We retain your personal information for as long as necessary to fulfill the purposes described in this policy, maintain your account, comply with legal obligations, resolve disputes, and enforce our agreements. Enrollment records and course completion data may be retained indefinitely to support credentialing and verification purposes.

7. Children’s Privacy

Our website, learning platform, and services are not directed to children under 13. We do not knowingly collect personal information from children. If we become aware that a child has provided personal information, we will delete it promptly.

8. Third-Party Links

Our website and learning platform may include links to third-party websites. We are not responsible for the privacy practices or content of those sites. We encourage you to review the privacy policies of any third-party sites you visit.

9. California Privacy Rights (CCPA/CPRA)

If you are a California resident, you have specific rights under the California Consumer Privacy Act (CCPA/CPRA):

- Right to Know: You may request details about the personal information we collect, use, and share.
- Right to Delete: You may request that we delete personal information we hold about you, subject to certain exceptions.
- Right to Correct: You may request correction of inaccurate personal information.
- Right to Opt-Out of Sale/Sharing: We do not sell your personal information. If we ever engage in such activity, you will have the right to opt out.
- Right to Non-Discrimination: We will not discriminate against you for exercising your privacy rights.

To exercise your rights under CCPA/CPRA, please contact us at:

Email: info@thefiduciaryinstitute.com

Mailing Address: 10940 SW Barnes Rd. #139, Portland, Oregon 97225

We will verify your identity before processing your request and respond within the time required by law.

10. Changes to This Policy

We may update this Privacy Policy from time to time. The updated version will be posted on our website and learning platform with the revised effective date. Continued use of the Platform after any update constitutes acceptance of the revised policy.

11. Contact Us

If you have any questions or concerns about this Privacy Policy or our data practices, please contact us:

The Fiduciary Institute

Email: info@thefiduciaryinstitute.com

Phone: 503-389-0510

Mailing Address: 10940 SW Barnes Rd. #139, Portland, Oregon 97225