

[Skip to main content](#)

 [Bessemer Trust](#)

Q × [Searchclose](#) ≡ × [menuclose](#)

Search this site

[Contact Us](#)

[Client login](#)

- [The Bessemer experience](#)
 - [Relationships that last](#)
 - [Always on your side](#)
 - [Deep family office expertise](#)
 -
- [What we do for you](#)
 - [Managing your financial life](#)
 - [Wealth planning](#)
 - [Investment management](#)
 - [Family office services](#)
 -
- [What makes us different](#)
 - [Peace of mind](#)
 - [Key facts](#)
 - [Our leaders](#)
 -
- [Insights & Education](#)
 - [Insights](#)
 - [Financial Education](#)
 -
- [Our offices](#)
- [Contact Us](#)
-
- [Careers at Bessemer](#)
- [For professional partners](#)
 - [Serving clients together](#)
 - [Insights for professional partners](#)
 -
- [Client Login](#)
-

BESSEMER TRUST PRIVACY POLICY

**ON-LINE PRIVACY
POLICY**

**CPRA PRIVACY
POLICY**

**GDPR PRIVACY
POLICY**

NOTICE OF COLLECTION OF PERSONAL INFORMATION AND PRIVACY POLICY UNDER THE CALIFORNIA PRIVACY RIGHTS ACT

This Notice of Collection of Personal Information and Privacy Policy (“CPRA Privacy Notice”) applies to the collection of personal information from California residents on and after January 1, 2023. This CPRA Privacy Notice supplements Bessemer Trust’s “Privacy Policy” to provide California residents with additional information about their privacy rights as required by the California Privacy Rights Act (“CPRA”). The CPRA Privacy Notice applies only to individuals residing in the State of California who are considered “consumers” under the CPRA and from whom we collect “personal information” as described in the CPRA.

This CPRA Privacy Notice describes the types and categories of personal information we collect, the business purposes for which we collect, process, use, store, and disclose your personal information, and your rights in personal information under the CPRA. Bessemer Trust (“Bessemer” or the “Company”) does not share your personal information with third party advertisers for cross-context behavioral advertising within the meaning of the CPRA (i.e., targeting you with advertising based on personal information obtained across businesses, websites, applications or services, other than the Company’s website or services). We do not sell your personal information.

For purposes of this CPRA Privacy Notice, we refer to personal information according to the following definition given in the CPRA: “personal information” means information that identifies, relates to, describes, is reasonably capable of being associated with, or could reasonably be linked, directly or indirectly, with a particular California resident or household. Personal information does not include publicly available information, information that is de-identified or aggregate consumer information, or information or rights that are outside the scope of the CPRA, including non-public personal information that is within the scope of the Gramm-Leach-Bliley Act (“GLBA”).

By using our Site, viewing our content (including our videos) or submitting your personal information to us, you consent to the collection, processing, use and disclosure of your personal information as set forth in this CPRA Privacy Policy, as it may be updated from time to time.

What categories of personal information do we collect about you?

We may collect personal information from you in various ways including:

- when you voluntarily provide us with information (e.g., through your communications with us by using our Site);
- when you communicate with us to request information concerning our services and products; and
- through automated means when you use our Site including by use of “cookies” and other similar technologies.

We collect the following categories of personal information. This table also sets out personal information we may have collected over the last twelve (12) months:

Categories	Examples	Retention Period
A. Identifiers	This information may include your name and contact details (including mailing addresses, telephone numbers, email addresses, IP address, browser or device identifier, and other identifying information you provide to us). For example, we may collect your name and email address when you request to receive information on our services.	For as long as you maintain an ongoing relationship with us or as necessary to fulfill the purposes set forth in this disclosure.
B. Customer Information under California Civil Code §1798.80(e)	This information comprises information that identifies, relates to, describes or is reasonably capable of being associated with you or your household in our business records. Some personal information in this category may overlap with other categories.	For as long as you maintain an ongoing relationship with us or as necessary to fulfill the purposes set forth in this disclosure.
C. Commercial Information	This category includes information concerning the services and products you requested to receive educational information on.	For as long as you maintain an ongoing relationship with us or as necessary to fulfill the purposes set forth in this disclosure.
D. Internet and other electronic history	This category comprises electronic information concerning your use of the website (www.Bessemer.com) and dependent pages (the “Site”), other than our secure client portal. This information may include information we automatically collect as you browse the Site, including your IP address, device type/identifier, browser	Generally, for as long as one [1] year

	type/identifier, pages visited, and other similar electronic information. We may use services provided by outside organizations, including Google Analytics, concerning your website activity to monitor your usage. We may collect information concerning your website usage through cookies and other technologies.	
E. Geolocation data	We may determine your approximate geographic location through your IP address.	Generally, for as long as one [1] year
F. Inferences drawn from information you provide to create a personal profile concerning your consumer preferences, characteristics, predispositions, behavior, and attitudes	We may accumulate the information you provide to develop a consumer profile concerning your behavior and interests, including for our marketing and advertising purposes, and to improve our services.	For as long as you maintain an ongoing relationship with us or as necessary to fulfill the purposes set forth in this disclosure.

We do not collect sensitive personal information for purposes of inferring characteristics.

What are our business reasons for collecting and using your personal information?

Depending on the individual circumstances, we collect, process, use and disclose personal information for legitimate business purposes. These purposes include:

- to communicate with you and respond to your inquiries.
- to provide you with educational materials and other information regarding our services.
- to show you educational videos.
- to market services tailored to your interests.
- to analyze and improve the functionality and effectiveness of our Site.
- to determine the general geographic region where visitors to our Site are located.
- to protect the security of our Site.
- to prevent, detect and investigate fraud.
- to fulfill the purpose for which you provided us with your personal information.
- to comply with our legal obligations.
- to improve our services and products.
- to further our other legitimate interests, including to make available and highlight content and opportunities that are relevant to you and other visitors to our Site.

What are our categories of sources of personal information?

The Company may collect personal information from the following categories of sources:

- directly from you;
- service providers providing services on our behalf. We require our service providers who we provide your personal information to in order to provide services to maintain the privacy and security of your personal information;
- our affiliates.

Who do we disclose your personal information to?

We do not sell your personal information to third parties, including the personal information of minors under sixteen [16] years of age.

In some instances, we may retain other companies and individuals to perform functions on our behalf, including, but not limited to, web hosting platforms, customer service providers, video content providers, website analytics providers, platform providers, and shippers. Such outside organizations may be provided with access to your personal information to perform the functions for which they have been retained. The Company requires its service providers, who provide services on our behalf to maintain the privacy and security of your personal information. By using our Site, you consent to the disclosure of your personal information to our service providers, including but not limited to our video content providers.

We may disclose your personal information to our affiliates for our legitimate business purposes.

We may disclose any information, including personal information, we deem necessary, in our sole discretion, to comply with any applicable law, regulation, legal process or governmental request, to protect ourselves from fraudulent or illegal activity, and to defend against legal claims.

In the past twelve (12) months, we have not shared the categories of personal information collected in Categories [A-F] with third parties.

In the past twelve (12) months, we have disclosed the categories of personal information collected in Categories [A-F] with the following organizations or entities who are not service providers or contractors providing services on our behalf: other Bessemer Trust affiliates or as required by applicable law.

What are your rights regarding your personal information?

Under the California Privacy Rights Act, you have the following rights in personal information held by us:

- You have the right to request that the Company disclose the personal information that we collect, use, and disclose about you. You may “request to know”: (i) the categories of personal

information that the Company has collected about you; (ii) the categories of sources from which the personal information is collected; (iii) the business or commercial purpose for collecting your personal information; (iv) whether any categories of personal information were disclosed for a business purpose to third parties and the categories of third parties with whom the Company discloses your personal information; and (v) the specific pieces of personal information that the Company has collected about you. Your request may pertain to the personal information collected about you on or after January 1, 2022. If your request covers a time period beyond twelve [12] months from the date of your request, the Company may deny your request as to that time period where it would be impossible for the Company to provide you with the information or involve disproportionate effort. The Company may deny your request to search for certain information under certain circumstances (e.g., where the Company retains the information solely for legal and compliance purposes).

- You have the right under certain circumstances to receive specific pieces of your personal information in a format that is understandable, and to the extent technically feasible, in a structured, commonly used, machine readable format that allows you to transmit the information to another entity.
- You have the right to correct inaccurate personal information.
- You have the right to request deletion of personal information under certain circumstances. For example, we may not be required to delete personal information if we need to retain the information to comply with a legal obligation. In addition, we may delay deletion with respect to data stored on an archived or backup system, until the archived or backup system relating to that data is restored to an active system or next accessed or used for a sale, disclosure, or commercial purpose.
- You have the right to know what information is shared with third parties, and to whom and to opt out of sharing for cross-context behavioral advertising.
- You have the right not to receive discriminatory or retaliatory treatment for the exercise of any of these rights. We will not discriminate or retaliate against you or refuse to provide you products or services because you have exercised your rights.

You may submit verifiable requests concerning any of your rights by contacting us by e-mail at [\[email protected\]](#), or by mail at the address provided below or by telephoning us at [\(888\) 811-8417](#).

Attention: Legal Department
Bessemer Trust
1271 Avenue of the Americas
New York, NY 10020
United States

We will use reasonable methods for verifying that the person making a request to know, data portability, request to correct or a request to delete is the individual about whom we have collected personal information.

This may involve, depending on the nature of the request, confirming that the email address provided corresponds with our records concerning the individual. Additional reasonable measures

may also be required to verify the identity of the person making the request depending on the circumstances. For requests to delete made electronically, you may be required to submit the request to delete, and then separately confirm that you want your personal information deleted. We will maintain a record of your request to delete. To the extent that you wish to use an authorized agent to make requests concerning the rights set forth above, you will need to provide us either with a power of attorney or, alternatively, with signed authorization to communicate with your authorized agent, and directly confirm that you provided the authorized agent with permission to submit the request.

We will (i) confirm receipt of requests to know, data portability, to correct inaccurate information or to delete within ten [10] business days of the request; and (ii) generally respond to requests to know, data portability, to correct inaccurate information or to delete within forty-five [45] calendar days of the request. If we need additional time to respond to your request beyond the forty-five [45] calendar days, we will provide you with notice explaining the reasons we need more time, and we will then take up to an additional forty-five [45] calendar days to respond to your request.

Do we provide access to the CPRA Privacy Notice by persons with disabilities?

Persons with disabilities who need assistance accessing this CPRA Privacy Notice may contact us as provided for above, and depending on your individual needs, the Company will grant reasonable requests to furnish this policy in an alternative format.

Do we provide financial incentives to California Consumers for providing us with personal information?

We do not offer you financial incentives such as loyalty programs, discounts, and special offers when you provide us with contact information and identifiers such as your name and email address.

California Shine the Light Law/Online Privacy Protection Act

California Civil Code §1798.83 provides that California residents may request certain information concerning the disclosure of personal information to third parties for direct marketing purposes. Pursuant to California Business Code §§22575-22579, you may review and request changes to any of your personal information that we have collected. Should you wish to request this information or exercise these rights, please reach us at the contact information provided above.

Revisions to This CPRA Privacy Notice

We may update this CPRA Privacy Notice at any time, by posting the amended version on this Site, including the effective date of the updated version. By accessing the Site or communicating with us after we make any such changes to this CPRA Privacy Notice, you are deemed to have accepted such changes. Please check this CPRA Privacy Notice regularly, and before you submit additional personal information via the Site.

As of: April 2024

-
- © 2024 Bessemer Trust. All rights reserved.
 - [Privacy Policy](#)
 - [Terms](#)
 - [Accessibility](#)
 - [Member FDIC](#)
 - [Pillar 3 Disclosure](#)