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Privacy Policy

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Farrell LLP (also “we,” “us,” and “our”) offers US and Canadian immigration services to individuals and companies from around the world. We respect your right to privacy and handle your personal information accordingly. This Privacy Policy explains how we handle your personal information.

1. Changes to This Privacy Policy

We may change this Privacy Policy from time to time as our business changes or legal requirements change. The date of the last revision appears at the top of this page.

2. Scope of This Policy

This Privacy Policy describes how we may collect, use, share and otherwise process your personal information, as an employee of one of our corporate clients or other individual to whom we offer our services via our website, our communications channels (e.g., online portals or platforms or email) or other online and offline means (e.g., via fax, physical mail, or courier).

3. What is Personal Information?

“Personal information” means any information provided to or collected by the Firm about an identifiable individual, or an individual whose identity may be reasonably inferred from the information. This encompasses all formats, such as electronic or paper documents. Aggregated information—data about multiple individuals where no single person can be identified—is not subject to this Privacy Policy, and we may use such aggregated data at our discretion. Likewise, this Privacy Policy does not extend to information about companies or legal entities.

4. Responsibility and Compliance

We take the protection of personal information very seriously. Our legal professionals are bound by professional conduct standards that impose confidentiality obligations regarding information entrusted to us by clients. Everyone associated with the Firm—professionals, support staff, temporary workers, contractors, and others who provide

services on our behalf—must comply with our internal policies that govern the protection and handling of personal information.

5. Basis for Processing

In most cases, we rely on your consent to process your personal information.

By providing us with your personal information, you are indicating your agreement to the collection, use, and sharing of that information as outlined in this Privacy Policy. If you disagree with these terms, please refrain from submitting any personal information. While sharing some personal details is optional, many of the immigration services we offer depend on this information. Without it, we may not be able to assist you.

Consent may be given in different forms—for example, explicitly through a signed document, verbal agreement, or electronically, or implicitly by voluntarily sharing your personal information.

In cases where your information was initially collected for one purpose but needs to be used for another, we will seek your approval unless legal regulations allow us to proceed without it.

There are also instances where we may collect, use, or disclose your information without your consent, as permitted or required by law.

You may withdraw your consent at any time. However, this may limit our ability to provide certain services. If this occurs, we'll explain why the information is necessary and how withdrawing consent may affect our ability to assist you.

If Europe's *General Data Protection Regulation* (GDPR) applies, we rely on one or more of the following legal bases when processing your personal information and sensitive personal information:

- consent to the processing of your personal information for the purposes of providing immigration consulting and legal services;
- processing is necessary for the performance of a contract to which you are a party (for the provision of private client services); and/or
- processing is necessary for compliance with a legal obligation to which Farrell LLP is subject to i.e., the government requirements regarding immigration services.

Where the provision of your personal information is a statutory or contractual requirement, you must provide your personal information to us so that we can process it. If you fail to provide your personal information in these cases, we will be unable to provide our services to you and you may encounter immigration and/or employment difficulties.

Data processing for other purposes may only be considered if the necessary legal requirements are met.

6. What Personal Information We Collect

We may gather personal information in various contexts. The types of information we may collect - including, but not limited to - the following:

- Identifiers, such as: a real name, aliases, postal address, unique personal identifier, online identifier, IP address, email addresses, account name, social security or social insurance number, driver's license number, passport/visa number, or other similar identifiers.
- Records and account information, such as: bank account number, credit/debit card number, signature, physical characteristics or description, telephone number, state or country ID number, , and any other financial information.
- Passport or other global mobility information, such as: age/date of birth, nationality, country of residence, gender, familial/relationship situation, ethnicity, other information relating to health, religion, political and/or military or paramilitary membership, spouse or partner and parental details. If we provide services for your family or companions, we may collect similar information about them.
- Account information for INSZoom online tool.
- Medical and criminal records or similar details.
- Employment information, such as: professional credentials or qualifications, resume, employment history (e.g., previous employers) or other employment-related information.
- Details about your legal needs, circumstances, or interests.
- Information about your organization or others involved—such as directors, employees, clients, witnesses, partners, investors, shareholders, beneficiaries, or opposing parties
- Your mailing list preferences (e.g., subscription or opt-out status)
- Payment or billing information
- Any other personal information you choose to share with us

At the time we collect your personal information, we will tell you the purposes for which we will use it and the basis for processing and direct you to this Privacy Policy for more details.

7. How We Collect Personal Information

We collect your personal information in two ways, directly from you when you provide it to us or when you automatically generate it, or indirectly when we obtain it from third parties.

Directly: We collect your personal information when you provide it to us in the course of using our services. For instance, you may provide it to us as part of the immigration services we are providing to you.

We also collect certain personal information automatically when you access our site. For example, we may collect information such as your IP address and the type of device you use to access our sites. We may also collect data about how you use INSZoom account, as well as using cookies and other tracking technologies.

From third parties: We may also collect personal information from third parties, such as:

- Clients for whom we provide services e.g., employers
- Regulatory bodies or legal authorities
- Organizations you or we engage with—such as government agencies, recruitment firms, service providers
- Publicly available records and data sources—particularly in relation to investigations or legal proceedings tied to our services, but also from sources such as LinkedIn, Facebook, Instagram, Google Scholar and other internet searches.

8. How We Use Your Personal Information

We handle personal information in compliance with this Privacy Policy and under no circumstances will we sell any such data.

We may use and share personal information for the following reasons:

- **Client Verification & Compliance:** To confirm your identity, meet Know-Your-Client and anti-money-laundering obligations, and fulfill other statutory or regulatory mandates. This may involve collecting identification and business-related details.
- **Billing & Payments:** To issue invoices and process transactions, which may require the collection and use of names, addresses, bank or financial account information, and payment details.
- **Service Delivery & Development:** To deliver the legal services to you or at the direction of your employer or immigration sponsor, to comply with our agreements with them or as you've requested—whether that involves advice, litigation, or other proceedings—using the necessary personal information to provide these services effectively.
- **Data Analysis & Preferences Management:** To analyze information for better service delivery, understand your preferences, manage mailing list statuses, and unsubscribe requests. You may opt out of such communications at any time.
- **Internal Management:** For record-keeping, analyzing our processes, improving efficiency, and maintaining our high professional standards (including certification and accreditation needs).

- **Client Support:** To respond to your inquiries and provide any requested materials or information.
- **Market Research & Marketing:** To conduct research, promote our offerings to those who opt in to our communications, and invite you to events, seminars, or updates relevant to your interests.
- **Preferences and Accuracy:** We may periodically request updates to ensure your contact information and preferences remain current.
- **Regulatory & Insurance Compliance:** To perform conflict-of-interest checks, set up necessary information barriers, assess and mitigate fraud risks, and meet our insurance requirements.
- **Complying with the Law:** Some of the activities we undertake are necessary to comply with our legal or other obligations as a business service provider of legal advice. Under certain circumstances, we may be required by law to provide personal information to law enforcement agencies, courts or others in connection with claims and other litigation; to comply with public records law, or an anti-terrorism request or fraud-related request.
- **Ad Hoc Legal or Consent-Based Uses:** For any other purpose that you consent to or that is permitted or required by law.

9. How We Share Your Personal Information

Transfer to Third Parties: We may share your personal information with trusted third parties (e.g. technical and administrative support providers, , translation services, education evaluators, or billing agents) to assist in delivering services. Such parties are contractually obliged to maintain confidentiality and handle the data securely.

Disclosure to Third Parties: In some cases we may need to disclose your personal information to third parties who need to use it for their own purposes.

- **Your employer:** Our services to you are typically provided under the terms of our service agreements with your employer or immigration sponsor. We share your information with them to allow them to manage their immigration needs and assure compliance with their policies. At the request of your employer or immigration sponsor, we may also share information with their vendors. In the event that our client wishes to engage alternative legal advisers, we may transfer your personal information to those advisors to ensure continuity of business.
- **With our business partners and partner network:** If your immigration request takes you to countries serviced by one of our local network partners, they may have access to your account information, immigration plans and other information necessary to provide you with the services you or your employer or immigration sponsor may request.
- **Immigration authorities in destination countries:** We share information with immigration authorities (for example consulates and other government or law enforcement agencies), and their vendors as necessary to provide immigration and related services to you and your employer.

- **Transaction:** In the event of a corporate transaction (like a merger or sale), your Personal Information may be shared—but only under agreements that restrict its use to purposes related to that transaction and preserve the privacy protections originally provided.
- **As permitted or required by law:** We share personal information when we think it's reasonably necessary to protect ourselves and the people who use our services, enforce agreements, respond to emergencies and comply with law.

In exceptional circumstances, we may share personal information with government agencies other than immigration authorities and other third parties if we believe it is reasonable and necessary to comply with law, regulation, legal process or governmental request; to enforce our agreements, policies and terms; to protect the security of our services; to protect the Firm or the public from harm or illegal activities; or to respond to an emergency.

We may also share personal information with other parties as directed by you or subject to your consent.

10. Transfers Outside Your Region

We or our service providers may transfer your personal information outside your region for processing. When we do this, your personal information will be subject to appropriate protections. If we do transfer personal information to outside of your region, it will be protected in the same way as if it was being used in your region. To do this, we use one of the following safeguards:

- We transfer to a country whose privacy laws ensure an appropriate level of protection for personal information.
- We put in place a contract with a third party that means they must protect personal information to the same standards.
- We transfer personal information to organizations that are part of specific agreements on cross-border data transfers with your region.

11. Marketing Communications & Unsubscribe Options

All marketing emails from us include an option to unsubscribe or adjust your preferences. To stop receiving such communications, simply use the unsubscribe link in any marketing email or contact us directly using the information provided in our communications.

12. Limiting Collection, Use, and Disclosure of Personal Information

We collect personal information only through lawful means and exclusively for purposes that have been clearly disclosed in this Privacy Policy or otherwise communicated to

you, or as permitted under applicable laws. We handle information in all formats—hard copy, electronic, telephone, fax, email, etc.—but only as necessary for specified purposes.

13. Retention Only as Needed

We retain personal information only as long as it is needed for:

- The purpose(s) for which it was collected or as outlined in this policy;
- Compliance with legal or regulatory obligations;
- Addressing any potential future issues.

Once the information no longer serves these purposes, we securely dispose of it by destruction, deletion, erasure, or anonymization.

14. Safeguards

We implement physical, procedural, and technical safeguards to protect your personal information.

Your information is typically stored in secure offices, and may be accessed only by individuals who need it to provide services.

In some cases, your personal information may be stored outside your region, especially if we work with third-party providers located elsewhere. In such scenarios, your information may be governed by the local laws of the jurisdiction where it is stored or accessed, including possible access by government or law enforcement agencies.

15. Automated Decision Making

We do not use any automated decision making technologies.

16. Your Rights

We strive to ensure your personal information is accurate, up to date, and sufficient for the purposes it serves. We will ask you about the accuracy of information we have. You play a role in helping keep information accurate and up to date. Please immediately contact the legal professional with whom you have been working if there are any changes or updates to your personal information.

You have the right to request access to your personal information and ask for corrections if you believe it's inaccurate. You can make such requests using the contact details provided below.

Where the basis of our processing was consent, you have the right to withdraw your consent. However, this may limit our ability to provide certain services. If this occurs, we'll explain why the information is necessary and how withdrawing consent may affect our ability to assist you.

If the GDPR applies, you have the right to object to or restrict the processing of your personal information. You may also requires the erasure of your personal information or exercise your right to data portability.

In all cases, while we aim to respond promptly, we may require identity verification before granting access. Access may be denied in certain situations—such as when disclosure would compromise another person's privacy, or if the information is protected by legal privilege. In these cases, we will inform you of the reason.

17. Questions? Concerns?

You can reach our privacy officer at:

Privacy Officer
Farrell LLP
80 Richmond St W, Suite 1200
Toronto, ON M5H 2A4

+1 (416) 363 1234

Privacyofficer@Farrell-llp.com

You also have the right to make a complaint to the data protection authority in your jurisdiction.