

Estate Valuations & Pricing Systems, Inc.

Vendor and Subcontractor Management Policy

Overview

EVP Systems uses vendors and subcontractors to fulfill its duties to its clients and provide its services as efficiently, economically, and quickly as possible. None of these third-parties have access to client Personally Identifiable Information (PII) or Sensitive Personal Information (SPI)—indeed, neither does EVP Systems itself—and it is company policy to require that they all conform to EVP Systems’ ethics, security, and compliance policies, at a minimum.

Vendors and Subcontractors

Below is a list of vendors and subcontractors that EVP Systems uses.

Vendor Name	Purpose	Length of Engagement
Google	Provides e-mail, versioned shared documents, video conferencing services	On-going
Microsoft	Provides workstation operating systems, compilers, workstation authentication, shared information storage, intra-company chat	On-going
Amazon	Provides hosting and support services for EVP Systems Data Center via AWS	On-going
Slack	Provides intra-company chat and file transfer	On-going
Dropbox	Provides shared filesystem and versioned backup of documents	On-going
GitHub	Provides version control of source code and configuration files	On-going
Mailchimp	Provides e-mail list management	On-going

Postmark	Provides out-bound mass e-mail delivery	On-going
Papertrail	Provides logging and log filtering	On-going
rsync.net	Provides filesystem backup	On-going
Uptime Robot	Provides uptime monitoring	On-going

Other subcontractors are used on a work-product basis for marketing material and business administration support. EVP Systems does not use vendors or subcontractors for programming, testing, system administration, compliance, client support, or billing.

Client Data Access

No vendors or subcontractors have access to client Personally Identifiable Information (PII) or Sensitive Personal Information (SPI). EVP Systems does not transmit or store this data via its EVP Office applications. More information is available in the “Personally Identifiable Information Statement” and “Data Privacy Statement” documents.

Minimum Requirements

All EVP Systems subcontractors and vendors must provide documentation that they meet or exceed the company’s requirements for legal, ethical, information security, and compliance reporting. This documentation must be provided at the beginning of the engagement, and then updated annually.

If a vendor or subcontractor does not meet EVP Systems minimum requirements, they will not be retained. If they fall out of compliance during the time of their partnership with EVP Systems, they will be terminated as soon as possible without disrupting client services.

Review and Update

This policy is reviewed and updated annually, to reflect any changes in vendor and subcontractor engagements.

Approval

This policy has been approved by the President of EVP Systems, Michael A. Walker, on the following dates:

November 22, 2022

[Signed:] Michael A. Walker

February 23, 2023
July 1, 2023
July 1, 2024

[Signed:] Michael A. Walker
[Signed:] Michael A. Walker
[Signed:] Michael A. Walker

Last Updated: October 13, 2024