

## **PRIVACY POLICY NOTICE**

Coordinated Plan, Inc.

We are dedicated to providing products and services that help protect you and your family. Just as important to us are the protection of your privacy and the safeguarding of the information that you voluntarily provide to us. We want you to understand what information we collect and how we use it. The following policy serves as our standard for the collection, use and security of your personal information.

### **What Information We Collect**

As part of our business, we obtain certain personal information about you in order to provide a financial product or service to you. This information includes information we receive from you on applications or other forms, information about your transactions with us, information provided by insurance-support organizations. For example, your personal information includes your medical history, financial information and identifying information such as your social security number and address.

### **What Information We Disclose**

We do not disclose nonpublic personal information about our current or former customers to anyone, except as permitted by law. The limited circumstances under which we are permitted by law to disclose a customer's personal information include: to the extent necessary to service or process a financial product or service that you requested or authorized; with your consent or at your direction; to your legal representative; in response to a subpoena; to comply with federal, state or local laws to protect against fraud. We are also permitted to disclose customer information to companies that perform services for us and with whom we have non-disclosure agreement.

### **Our Security Procedures**

We collect only relevant information about our customers. We safeguard the personal information of our current and former customers and disclose it only for legitimate business or legal reasons. We restrict access to information about you to only those individuals who need to know that information to provide products or service to you; for example underwriting, customer service and claims processing. All of our employees, agents, and contractors are required to respect customer privacy and those who violate our privacy policy are subject to discipline.

### **“Opt-Out” Provisions**

Since we do not share non public personal information except where required as described above or when you have authorized us to do so, there is no need to “Opt Out!”